Cognos(R) 8 Business Intelligence

GETTING STARTED

COGNOS®

THE NEXT LEVEL OF PERFORMANCE™

Product Information

This document applies to Cognos(R) 8 Version 8.3 and may also apply to subsequent releases. To check for newer versions of this document, visit the Cognos Global Customer Services Web site (http://support.cognos.com).

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Introduction

This document is intended for use with Cognos 8. Cognos 8 is a Web product with integrated reporting, analysis, scorecarding, and event management features.

Using This Document

This document introduces the Cognos 8 Business Intelligence architecture and provides examples to illustrate key functionality.

The following products are part of the Cognos 8 Performance Management solution, and are not discussed in this document:

- Cognos 8 Controller is a Web-based financial consolidation tool that provides standard reports to support both statutory and management reporting

  For more information, see the Cognos 8 Controller *User Guide*.

- Cognos 8 Workforce Performance is a next-generation analytic application geared to helping organizations optimize their human capital management. It is the first analytic application to capitalize on the open modern architecture of Cognos 8 Business Intelligence. It provides human resources executives and managers with a complete spectrum of packaged reports on key, configurable workforce measures to help improve planning and management decisions.

  For more information, see the Cognos 8 Adaptive Analytics *User Guide* and the Cognos 8 Adaptive Warehouse *User Guide*.

- Cognos Planning provides the ability to plan, budget, and forecast in a collaborative, secure manner. There are two major components: Cognos Planning - Analyst and Cognos Planning - Contributor.

  For more information see the Cognos Planning - Analyst *User Guide* and the Cognos Planning - Contributor *Administration Guide*.

Audience

This document is intended for users who are new to Cognos 8 Business Intelligence.

Related Documentation

Our documentation includes user guides, getting started guides, new features guides, readmes, and other materials to meet the needs of our varied audience. The following documents contain related information and may be referred to in this document.

Note: For online users of this document, a Web page such as **The page cannot be found** may appear when clicking individual links in the following table. Documents are made available for your particular installation and translation configuration. If a link is unavailable, you can access the document on the Cognos Global Customer Services Web site (http://support.cognos.com). Logon

credentials are available either from your administrator or by request from support.america@cognos.com.

Document	Description
Cognos Connection User Guide	Using Cognos Connection to publish, find, manage, organize, and view Cognos content, such as scorecards, reports, analyses, and agents
Cognos 8 Administration and Security Guide	Managing servers, security, reports, and portal services; setting up Cognos samples; troubleshooting; and customizing Cognos 8
Analysis Studio User Guide	Exploring, analyzing, and comparing dimensional data
Cognos 8 New Features	Describing features that are new in this release
Map Manager Installation and User Guide	Installing and using Map Manager to import and manage maps that are used in map reports
Query Studio User Guide	Creating self-service business intelligence reports
Report Studio Professional Authoring User Guide	Authoring reports that analyze corporate data according to specific needs
Report Studio Express Authoring User Guide	Authoring financial reports that analyze corporate data according to specific needs
Event Studio User Guide	Creating and managing agents that monitor data and perform tasks when the data meets predefined thresholds
Cognos 8 Architecture and Deployment Guide	Understanding the Cognos 8 architecture, developing installation strategies, including security considerations, and optimizing performance
Framework Manager User Guide	Creating and publishing models using Framework Manager
Metric Studio User Guide	Authoring scorecard applications and monitoring the metrics within them
Cognos 8 Migration Tools User Guide	Moving metadata and applications from Cognos Series 7 to Cognos 8

Document	Description
Cognos 8 Go! Office User Guide	Using Cognos 8 Go! Office to retrieve content from Cognos reporting products within Microsoft Office

Finding Information

To find the most current product documentation, including all localized documentation, access the Cognos Global Customer Services Web site (http://support.cognos.com). Click the **Documentation** link to access documentation guides. Click the **Knowledge Base** link to access all documentation, technical papers, and multimedia materials.

Product documentation is available in online help from the **Help** menu or button in Cognos products. You can also download documentation in PDF format from the Cognos Global Customer Services Web site.

You can also read PDF versions of the product readme files and installation guides directly from Cognos product CDs.

Using Quick Tours

Quick tours are short online tutorials that illustrate key features in Cognos product components. To view a quick tour, start Cognos Connection and click the **Quick Tour** link in the lower-right corner of the Welcome page.

Getting Help

For more information about using this product or for technical assistance, visit the Cognos Global Customer Services Web site (http://support.cognos.com). This site provides product information, services, user forums, and a knowledge base of documentation and multimedia materials. To create a case, contact a support person, or to provide feedback, click the **Contact Us** link. For information about education and training, click the **Training** link.

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Chapter 1: Cognos 8 Business Intelligence

Cognos 8 Business Intelligence is an integrated business intelligence suite that provides a wide range of functionality to help you understand your organization's data. Everyone in your organization can use Cognos 8 to view or create business reports, analyze data, and monitor events and metrics so that they can make effective business decisions.

Cognos 8 integrates the following business intelligence activities in one Web-based solution.

Before you use Cognos 8, you should understand how each of the components that make up the Cognos 8 user interfaces can help you do your job.

Activity	Component
Publishing, managing, and viewing content	Cognos Connection
Ad hoc querying	Query Studio
Managed reporting	Report Studio
Event management and alerting	Event Studio
Scorecarding and metrics	Metric Studio
Analyzing your business	Analysis Studio
Working with Cognos content in Microsoft Office	Cognos 8 Go! Office
Search for business intelligence content	Cognos 8 Go! Search

For more information about how Cognos 8 products work together, see "How Cognos 8 Works" (p. 13).

You will also want to know how to use Cognos Connection and the Cognos Administration console to view and organize content (p. 16), set up administration (p. 17) and security (p. 17), and schedule content (p. 18).

If you are building Cognos 8 applications, you may want to understand the Cognos 8 software development kit (p. 18) and workflow (p. 18).

Depending on your licensing permissions, you may not have access to all the functionality available in Cognos 8.

Cognos Connection

Cognos Connection is the Web portal for Cognos 8. It is the starting point to access your BI information and the functionality of Cognos 8. Use the portal to publish, find, manage, organize, and view your organization's business intelligence content, such as reports, scorecards, and agents. If you have the necessary permissions, you can access the various studios from the portal and use the portal for content administration, including scheduling and distributing reports, and creating jobs.

You view reports in Cognos Viewer.

System administrators also use the portal to administer servers, optimize performance, and set access permissions.

For information about using Cognos Connection, see "Example - Run a Report" (p. 21), "Example - Schedule a Report" (p. 24), and "Example - Create a Portal Page" (p. 26).

Query Studio

Query Studio is the reporting tool for creating simple queries and reports in Cognos 8. Casual or novice users use Query Studio to create self-serve reports that answer simple business questions.

With minimal steps, you can view data, author basic reports, change the report layout, filter and sort data, add formatting, and create charts.

When you use Query Studio, you interact directly with your data.

For information about using Query Studio, see "Example - Create a Query" (p. 28).

Report Studio

Report Studio has been extended to serve the needs of users who need quick and easy report creation and formatting capabilities, without requiring professional authoring skills. Report Studio now contains the traditional Professional authoring mode, with enhancements in this release, as well as the Express authoring mode.

Authoring Modes

To meet the needs of both regular report authors and financial report authors, Report Studio provides tailored user interfaces that contain reporting features relevant to these roles. Access to each authoring mode is determined by the permissions you have to secured functions and features. For more information, see the Administration and Security Guide.

Professional Authoring Mode

The Professional authoring mode gives users access to the full range of Report Studio functionality. In this mode, you can create any report type, including charts, maps, lists, and repeaters, using any data source (relational or multi-dimensional). It contains a superset of the features available in the Express authoring mode. However, you cannot view live data.

For more information about using the Report Studio Professional authoring mode, see "Example - Create a Report" (p. 36).

Express Authoring Mode

The Express authoring mode provides a simplified and focused Report Studio interface. It is designed for non-technical users to create traditional financial and management statement reports. It allows access to dimensionally-modeled data and uses a member-oriented data tree, by default.

This authoring mode allows you to see live data and supports crosstab reports at this time. It contains a subset of the features available in the Professional authoring mode.

When you are in the Express authoring mode, if you open a report that was authored in the Professional authoring mode, you can see but cannot modify objects that can be inserted only in the Professional authoring mode, such as charts, maps, and lists.

For more information about using the Report Studio Express authoring mode, see "Example - Create a Statement-Style Report" (p. 32).

Event Studio

Use Event Studio to notify decision-makers in your organization of events as they happen, so that they can make timely and effective decisions.

Use Event Studio to create agents that monitor status changes, priority customers, your organization's data to detect occurrences of business events, or any other factor that is important to your business.

Specify the event condition, or a change in data, that is important to you. When an agent detects an event, it can perform tasks, such as sending an email, adding information to the portal, and running reports.

For information about using Event Studio, see "Example - Manage an Event" (p. 41).

Metric Studio

Use Metric Studio to create a customized scorecarding environment to monitor and analyze business metrics throughout your organization. Metric Studio helps you translate your organization's strategy into relevant, measurable goals that align each employee's actions and accountability with a strategic plan.

A rich scorecarding environment of Metric Studio shows you where your organization is successful and where it needs improvement. It tracks performance against predetermined targets and indicates the current status of the business so that decision makers at every level of the organization can react and plan.

With Metric Studio, you can readily see how the organization is progressing against its strategy. You can set priorities for your own actions and understand how your decisions affect the performance of the company.

Use the flexibility of Metric Studio to model metrics and their relationships based on any standard or proprietary scorecarding and management methodology that you already use.

For information about using Metric Studio, see "Example - Monitor Performance" (p. 45).

Analysis Studio

Managers and analysts use Analysis Studio to better understand their business and to get answers to questions that they have about their business. Users can quickly and easily perform analysis to get to the what and why behind an event or action so that they can improve business performance.

With analysis, it is possible to see trends and understand anomalies or variances that may not be evident with other types of reporting. Analysis Studio users can easily zoom in on what is important even with large volumes of dimensional data.

When you use Analysis Studio, you interact directly with visible data.

For information about using Analysis Studio, see "Example - Create an Analysis" (p. 51).

Cognos 8 Go! Office

By using Cognos 8 Go! Office, you can work with secure Cognos content in your familiar Microsoft Office environment. You can retrieve report content from a variety of Cognos applications, including Cognos 8 and Cognos PowerPlay. Cognos 8 Go! Office provides access to all Cognos report content, including data, metadata, headers, footers, and charts. You can use predefined reports or create new content using Query Studio, Analysis Studio, or Report Studio.

By importing content into Microsoft Office Excel, you can work with the data and leverage Microsoft Office Excel's formatting, calculation, and presentation capabilities. You can also use the formatting and charting features of Microsoft Office Excel.

By importing content into Microsoft Office PowerPoint and Microsoft Office Word, you can include reports and charts to enhance your presentations and documents.

For more information about Cognos 8 Go! Office, see "Example - Work with Cognos Content in Microsoft Excel" (p. 56).

Cognos 8 Go! Search

With Cognos Go! Search, you can perform full-text searches of Cognos 8 business intelligence content. You can use this search in Cognos Connection, Cognos Viewer, Query Studio, and Analysis Studio.

With Cognos Go! Search, you can quickly find relevant business intelligence information presented in reports, analyses, dashboards, metric information, and events. Your search results are ranked based on your priorities.

Administrators create and manage the search index. Administrators can also create Go! cards which allow enterprise search engines, such as IBM WebSphere Information Integrator OmniFind Edition, to index Cognos 8 content. Cognos Go! Search also allows administrators to easily supply the Google OneBox for Enterprise with report, metric and search result content.

For more information about Cognos 8 Go! Search, see "Example - Search for Business Intelligence Content" (p. 59).

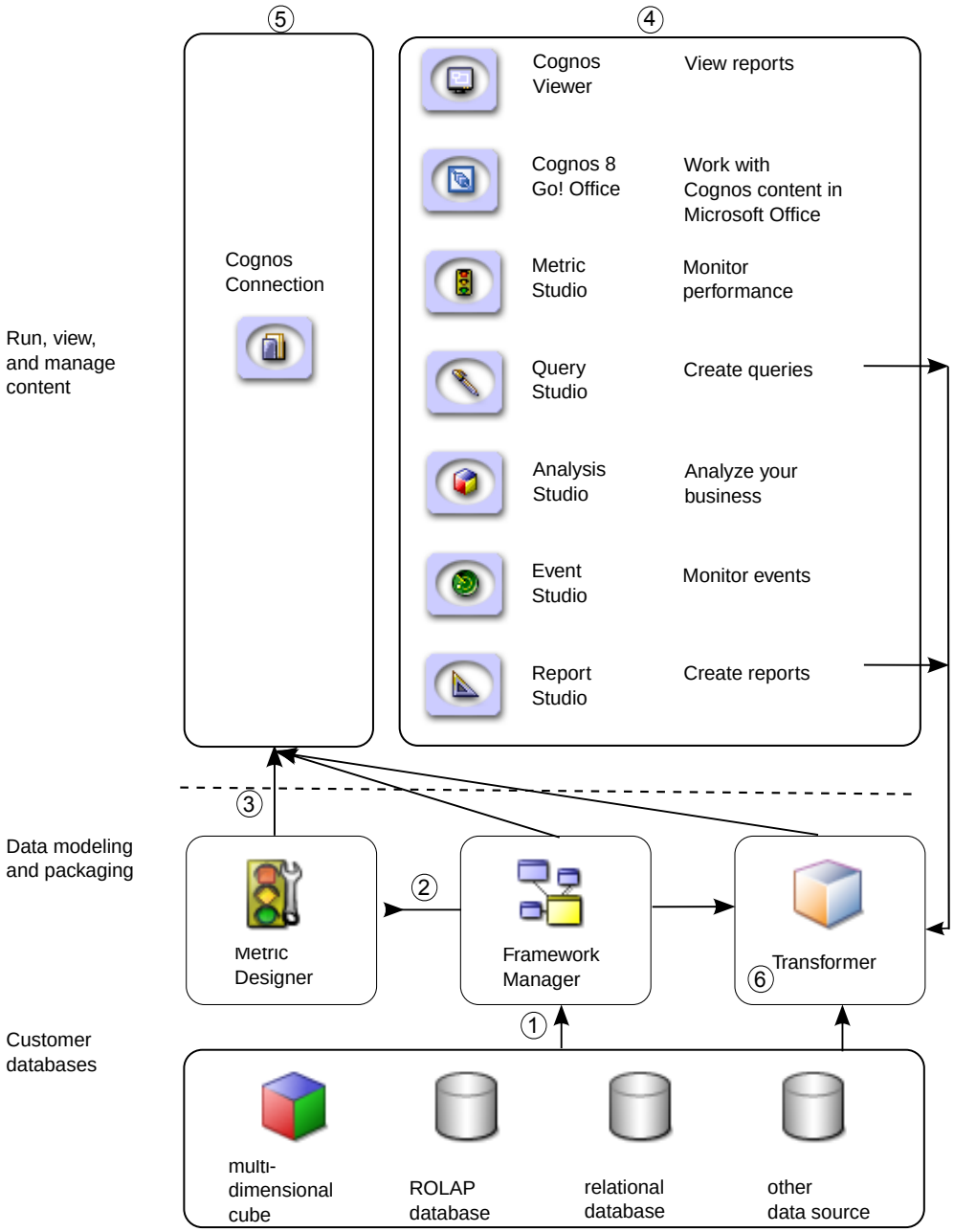
Transformer

Cognos 8 Transformer is a multidimensional data modeling component designed for use with Cognos 8.3 and subsequent releases.

You use this component to create a multidimensional model; a business presentation of the information in one or more different data sources which share common data. After you add the needed metadata from Cognos 8 packages, reports, and other various data sources, model the needed dimensions, customize the measures, and apply Cognos 8 secured views with dimensional filtering, you can create PowerCubes based on this model. You can deploy these cubes to support OLAP reporting and analysis around the globe.

How Cognos 8 Works

When you view or create a report, you are viewing and manipulating data stored in your organization's databases. The following diagram explains the steps involved in using Cognos 8.



1. In Framework Manager, the modeler ensures that metadata is presented in a manner that business users can understand it. Modelers import the metadata from one or more databases, and then add to the model to meet user requirements.

2. In Metric Designer, the modeler identifies the data items and calculations that form the targets and actual results for each metric.

3. The modeler then publishes and updates packages to Cognos Connection so that authors can use them to create reports, agents, and scorecards.

4. Business users and report authors use the published packages to understand their business data.

5. Users run, view, and manage their content in Cognos Connection. Depending on their security permission they may be able to simply run and view reports or manage schedules, portal layout, and other users' permissions.

6. In Transformer, you can leverage queries in published packages, queries fromCognos 8 reports, and personal data sources, such as Microsoft Excel, to create a unique, focused model of your business. Transformer is Cognos' industry leading OLAP modeling tool, which is designed so that business users can be self-sufficient in modeling a view of the business that suits the needs of their department or specialty.

For more information, see the Cognos 8 Architecture and Deployment Guide.

Report Specifications

When authors create a report, they are actually creating a report specification. The report specification is an XML representation of the queries and prompts that are used to retrieve data, as well as the layouts and styles used to present the data. For simplicity, the report specification is called the report.

Report specifications can be useful to report authors for troubleshooting.

For information about working with report specifications, see the Report Studio Professional Authoring *User Guide* or the Report Studio Express Authoring *User Guide*, and the Cognos 8 Software Development Kit *Developer Guide*.

Models and Packages

Because stored data is typically designed for storage, and not for reporting, a data modeler uses Framework Manager to create metadata models. A model structures, adds to, and manages data in ways that make sense to business users. For example, a model defines business rules, data descriptions, data relationships, business dimensions and hierarchies, and other administration tasks.

Planning and creating a model is an important task that should be performed by a modeler or a modeling team familiar with both the database structure and the needs of the business users.

After the metadata model is defined, modelers create a package to make metadata available to report authors. Each package must contain all the information that a specific user or group of users needs to create reports. For example, one package can contain human resources data, and another sales data. When users open an authoring studio, they must select which package to use. Each report can contain data from only one package.

After a package has been made available in Cognos Connection, a Transformer modeler can begin to design a multidimensional PowerCube for more summarized analysis of the business. The queries can be created directly in Transformer using metadata from any published package. A business specialist could also design their own model for more focused analysis and combine metadata from different packages and even include personal data using flat files.

A more refined query intended for Transformer modeling could be authored by a business specialist by creating a report in Query Studio or Report Studio. That report can then be accessed in Transformer allowing the business specialist full control over changes to the report, and therefore the query, rather than relying on the Framework Manager administrator for changes. Once the multidimensional design is complete, Cognos 8 security can be added with dimensional filtering and the PowerCube built. The PowerCube can then be published to Cognos Connection just like any other package, making it available for multidimensional analysis and reporting.

For information about data modeling, see the Framework Manager *User Guide*, the Metric Designer *User Guide*, or the Cognos 8 Transformer *User Guide*.

Viewing and Organizing Content

When you view and run a report, scorecard, or agent, the information that you see comes from data sources, the package, calculations, other properties added by the author, and from Cognos 8 itself.

You use Cognos Connection to organize your reports and other Cognos 8 content such as agents, metrics packages, URLs, and folders. You can access public content in the **Public Folders** tab or custom portal pages, and store and access your favorite content in the **My Folders** tab.

Report and Agent Views

If you want to personalize an existing public report or agent, you can create a report or agent view and save the view in the **My Folders** tab. This allows you to save prompt values, modify the schedule, and change the output format of reports.

For more information, see the online help in Cognos Connection.

Report Outputs

When a report is run, it contains the latest data from the data source. However, viewing the most recent data may not always meet your needs. When you want to view older data, you save and view the report output.

Report outputs are created when you schedule a report, when a report has multiple formats or languages, when a report has a delivery method of save, print, or email, and when a report is burst.

You can produce report outputs in the following formats:

- HTML
- PDF
- Excel
- delimited text (CSV)
- XML

If you are the owner of a report or have the necessary permissions, you can specify the default format for each report. You can also specify how many report output versions to keep.

For more information, see the online help in Cognos Connection.

Drill-through Links

A report can contain drill-through links, also known as Go To links, so that you can easily open related content. A value in the report is linked to more detailed information in another report. For example, a report includes sales information for each continent. When you click a continent name, a more detailed report about sales for that specific continent opens.

When you view report data in Cognos Connection, Query Studio, and Analysis Studio, you can also drill down and drill up. When you drill down, you follow a link from one layer of data to a more detailed layer within the same report. When you drill up, you access a less detailed layer.

For more information, see the online help in Cognos Connection, Query Studio, or Analysis Studio.

Multilingual User Interface and Content

Cognos 8 is a multilingual solution that lets you author reports once and deploy them globally. When users open a report, it automatically opens in the proper language, based on their locale settings.

You can select the language that you prefer for the user interface. If your data and reports are available in multiple languages, you can also select the language that you prefer for the content.

To deliver multilingual content, you can create each entry with multilingual properties in the appropriate studio.

For more information about the multilingual capabilities of Cognos 8, see the online help in Cognos Connection or see the Cognos 8 Architecture and Deployment Guide.

Portal Pages

In Cognos Connection, you can create your own custom portal pages. You use these portal pages to view frequently-used content, to group related reports and folders, and to combine Cognos and non-Cognos content within a single page. Within your portal pages, you can add Cognos portlets, which you use to view and interact with your Cognos content.

If you have the necessary permissions, you can create public pages that other users and groups can access and even use as their own. You can assign security permissions to allow only certain users to access the pages.

For more information, see the online help in Cognos Connection.

Administration of Cognos 8

Cognos 8 administrators ensure that Cognos 8 runs smoothly and at its optimum performance. They can

- define connections to the organization's data sources
- define security permissions for users and groups in the organization
- specify distribution lists, contacts, and printers
- manage servers and dispatchers and fine-tune the performance of Cognos 8
- pre-define links for an entire package that authors can then easily add to their reports
- customize the appearance and functionality of Cognos 8

For more information, see the Cognos 8 Administration and Security Guide.

Security

Cognos 8 is secured by setting permissions and enabling user authentication. If anonymous access is enabled, you can use Cognos 8 without authenticating as a specific user.

In Cognos 8, administrators define permissions so that users can access functionality. For example, to edit a report using Report Studio, you must have the appropriate security and licensing permissions.

In addition, each entry in Cognos Connection is secured to define who can read, edit, and execute the entry.

For more information, see the online help in the Cognos Administration console.

Scheduling Content

You can schedule most content that appears in Cognos Connection to run at a time that is convenient for you.

You can schedule

- reports
- metrics
- metrics data refreshes
- agents
- deployments

You can also create jobs to schedule multiple entries together.

For more information, see the online help in Cognos Connection.

The Software Development Kit

The Cognos 8 software development kit (SDK) provides a platform-independent automation interface for working with Cognos 8 services and components. Developers in your organization can use the Cognos 8 SDK to create custom reports, manage deployment, and integrate security and portal functionality to suit your needs, locale, and existing software infrastructure. The SDK uses a collection of cross-platform Web services, libraries, and programming interfaces.

You can choose to automate only a specific task, or you can program the entire process from modeling through to reporting, scheduling, and distribution.

The SDK is available as a separate package.

For more information, see the Cognos 8 SDK *Developer Guide* and Cognos 8 SDK *Getting Started Guide*.

Integrating with Other Cognos Products

Cognos 8 is fully integrated with other Cognos products so your business intelligence capabilities can grow with your needs.

When you integrate Cognos Series 7 with Cognos 8, you can

- access Series 7 reports from Cognos Connection

- access PowerCubes built with PowerPlay Transformer 7

When you integrate Cognos Planning products with Cognos 8, you can

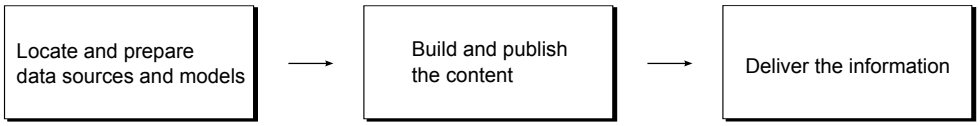
- access Cognos Planning - Contributor from Cognos Connection
- create queries, analyses, and reports based on Cognos Planning and Cognos Finance data

For more information, see the Cognos Planning - Contributor *Administration Guide*.

Building Cognos 8 Applications

The lifetime of a Cognos 8 business intelligence application can be months, or years. During that time, data may change, and new requirements appear, so authors must modify existing content and develop new content, and administrators must update models and data sources as the underlying data changes. For more information about using data sources, see the *Administration and Security Guide* and the Framework Manager *User Guide*.

In a working application, the technical and security infrastructure and the portal are in place, as well as processes for change management, data control, and so on. For information about the workflow associated with creating Cognos 8 content, see the *Architecture and Deployment Guide*. For more information, see the Cognos Solutions Implementation Methodology toolkit, which includes implementation roadmaps and supporting documents. The Cognos SIM toolkit is available on the Cognos Global Services Web site, http://support.cognos.com/en/consulting/csim/index.html.



- locate and prepare data sources and models

  Cognos 8 can report from a wide variety of data sources, both relational and dimensional. Database connections are created in the web administration interface, and are used for modeling, for authoring and for running the application.

  To use data for authoring and viewing, the business intelligence studios need a subset of a model of the metadata (called a package). The metadata may need extensive modeling in Framework Manager.

- build and publish the content

  Reports, scorecards, and so on are created in the business intelligence studios of Cognos 8. Which studio you use depends on the content, lifespan and audience of the report, and whether the data is modeled dimensionally or relationally. For example, self-service reporting and analysis are done through Query Studio and Analysis Studio, and scheduled reports are created in Report Studio. Report Studio reports and scorecards are usually prepared for a wider audience, published to Cognos Connection or another portal, and scheduled there for bursting, distribution, and so on. You can also use Report Studio to prepare templates for self-service reporting.

- deliver and view the information

You deliver content from the Cognos portal or other supported portals, and view information that has been saved to portals, or delivered by other mechanisms. You can also run reports, analyses, scorecards, and so on from within the business intelligence studio in which they were created.

For information about tuning and performance, see the *Administration and Security Guide* and the Cognos Global Services Web site, http://support.cognos.com.

Chapter 2: Cognos 8 Examples

The following examples show the different functionality of the various Cognos 8 components:

- run a report in Cognos Connection (p. 21)
- schedule a report in Cognos Connection (p. 24)
- create a portal page in Cognos Connection (p. 26)
- create a query in Query Studio (p. 28)
- create a statement-style report in Report Studio (p. 32)
- create a report in Report Studio (p. 36)
- manage an event in Event Studio (p. 41)
- monitor the performance of your business in Metric Studio (p. 45)
- analyze items in your business data in Analysis Studio (p. 51)
- work with Cognos content in Microsoft Office Excel using Cognos 8 Go! Office (p. 56)
- search for business intelligence content using Cognos Go! Search (p. 59)

You can do any of these examples without having to do them all. For example, you can start with the Analysis Studio example without doing the previous examples.

Before you experiment with a data source of your own, we recommend that you try these examples using the sample data.

Cognos Samples

Before you can work through these examples, ensure that the Cognos samples are set up. They show a good cross section of reports that you can create using Cognos 8.

For more information, contact your administrator or see the Cognos 8 Administration and Security Guide.

The sample databases shipped with Cognos 8 contain data from the operations of a fictional retail company, the Great Outdoors Company. The Great Outdoors Company sells camping and sports equipment directly in retail stores across the world, and through other manufacturers.

Example - Run a Report

Cognos Connection is the Web portal that gives you access to all the Cognos 8 functionality. In the portal, you can run reports.

In this exercise, you will learn how to

- navigate the portal
- run a report
- navigate within a report
- view the report in a different format

You are a business analyst for the Great Outdoors Company. You are asked to study the percentage of products that are returned. Returned items reveal important information about the quality of products, especially when products are returned because they are defective or are missing parts.

Things to Notice

The icon for a report shows the default format and default action of the report.

Reports that have saved outputs have an additional icon in the **Actions** column.

At any time, you can click the arrow next to the help button, and click **Go to the Welcome Page** to return to the **Cognos 8 Welcome** page.

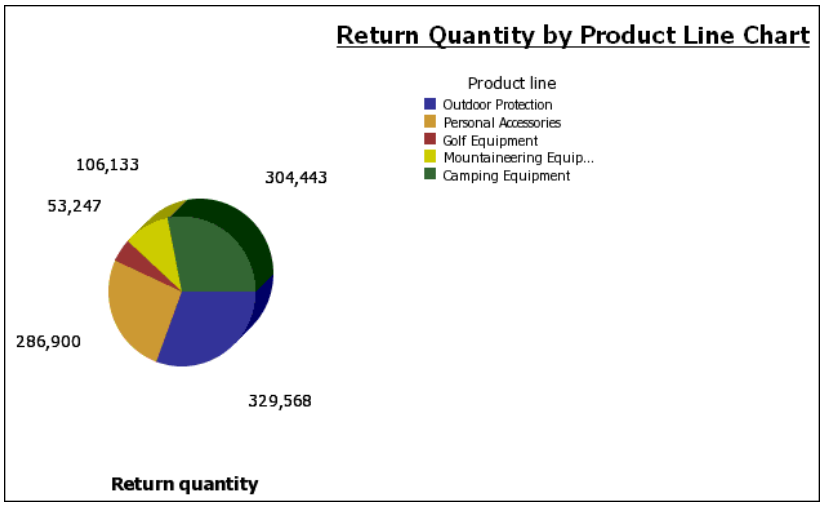
Steps

1. Open Cognos Connection:
   - Start your Web browser.
   - In the address bar, type the URL supplied by your administrator, and then press Enter. The URL looks something like this:

     http://*servername*/cognos8
2. In the **Cognos 8 Welcome** page, click **Cognos content**, click the **GO Data Warehouse (analysis)** package, and then click **Query Studio Report Samples**.
3. Locate the **Return Quantity by Product Line Chart** report.

   Tip: The icons beside an entry identify its default action and format. The default format for this report is HTML and the default action is to run the report.
4. Click the report name to run the report.

   The report runs and opens with the latest data about product returns.



You notice that **Outdoor Protection** products have the highest number of returns. You want to drill down to obtain more detailed information.

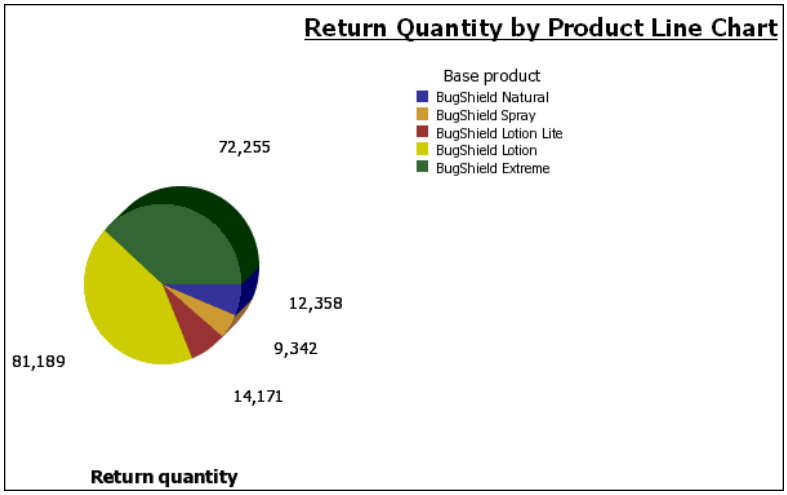
5. Click the **Outdoor Protection** area in the pie chart to drill down to more detailed information.

   Tip: You can also drill down by right-clicking the pie area, by clicking the drill down button on the toolbar, or by clicking the legend label.

   At a quick glance, you notice that insect repellents have the highest number of returns.

6. Drill down on **Insect Repellents**.

   You notice that the **BugShield Lotion** has the highest number of returns.



Try on Your Own

- Change the report format to PDF.

  Tip: In the Actions menu, click the run with options button . From the **Format** list, select **PDF**, and click **Run**.

- Change the language settings in your Web browser or in Cognos Connection and then run the report again. Because the sample data is multilingual, all data will be translated.

Tip: Next to the my area area button, click the down arrow, and click **My Preferences**. Under **Regional options**, change the **Product language** and the **Content language**. You need to run the report in order to see the content language changes.

- On the toolbar, click the home or return button to return to the portal.

For More Information

For more information about running reports, see the online help in Cognos Connection.

Example - Schedule a Report

You can schedule entries that are stored in Cognos Connection, such as reports, queries, and agents, so that they run at a time that is convenient for you.

In this exercise, you will learn how to

- save a report as a report view
- schedule a report so it runs daily
- use the schedule management tool to view the status of the schedule

You are a business analyst for the Great Outdoors company. You want to schedule the **Return Quantity by Product Line Chart** report because some people in your organization need the data updated daily. You schedule the report to run daily, and then check that it is properly scheduled.

Things to Notice

When a report runs according to a schedule, the report output is saved and appears in the **Action** column in Cognos Connection.

At any time, you can click the arrow next to the help button, and click **Go to the Welcome Page** to return to the **Cognos 8 Welcome** page.

Steps

1. Open Cognos Connection:
   - Start your Web browser.
   - In the address bar, type the URL supplied by your administrator, and then press **Enter**. The URL looks something like this:

     http://*servername*/cognos8
2. In the **Cognos 8 Welcome** page, click **Cognos content**, click the **GO Data Warehouse (analysis)** package, and then click **Query Studio Report Samples**.

   Locate the **Return Quantity by Product Line Chart** report. You can also use any one of the Cognos sample reports.
3. Create a report view for a daily view of the report:

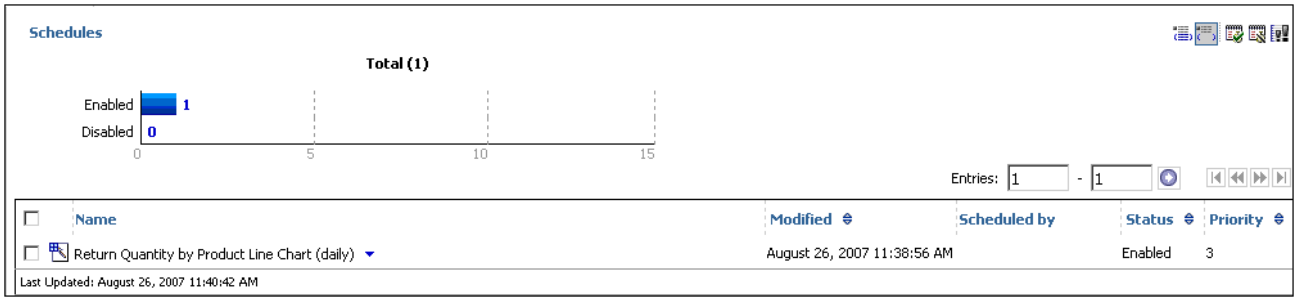
- In the **Actions** column, click the create a report view button next to the report.
- In the **Name** box, remove the words **Report View of** from the beginning of the name, type (**Daily**) at the end of the name, and then click **Finish**.

A new entry appears in Cognos Connection, with the report view icon .

4. Schedule the report view to run daily:
   - For the entry, in the **Actions** column, click the schedule button .
   - Under **Frequency**, click the **By Day** tab.
   - Accept the default time and other defaults.
   - Click **OK**.
5. Check the schedule:
   - Next to the my area icon , click the down arrow, and click **My Activities and Schedules**.
   - Click **Schedules**.
   - In the **Filter** pane, select **Any** status and **Any** priority, and click **Apply**.

     If you are accepting the default settings, you will not see any changes in the schedule.

Your report view appears in the list of scheduled reports.



Try on Your Own

- Modify the schedule so that the report runs weekly.

  Tip: In the **Actions** tab, click **More**, and then click **Modify the schedule**.
- Permanently remove the schedule.

  Tip: In the **Actions** tab, click **More**, and then click **Remove the schedule**.

For More Information

For more information about scheduling reports, see the online help in Cognos Connection.

Example - Create a Portal Page

You can customize the portal, Cognos Connection, by creating your own portal pages. You can choose the information that is most important to you and make it available from your page. You can choose from different types of content and organize the pages in a way that works for you.

This exercise shows how to

- create a page
- add content to a page
- define the appearance of a page
- enhance the content of a page

You want to create a personal page that includes all of the reports and content that you worked on in the previous exercises so that you can easily view the content each time you log on to Cognos 8.

Things to Notice

In a portal page, you can add Cognos content, such as business intelligence reports, utilities, such as URLs and bookmarks, and third-party portlets.

You can make a portal page available to a group in your organization, such as to the sales team, or you can create a portal page for your personal use.

Steps

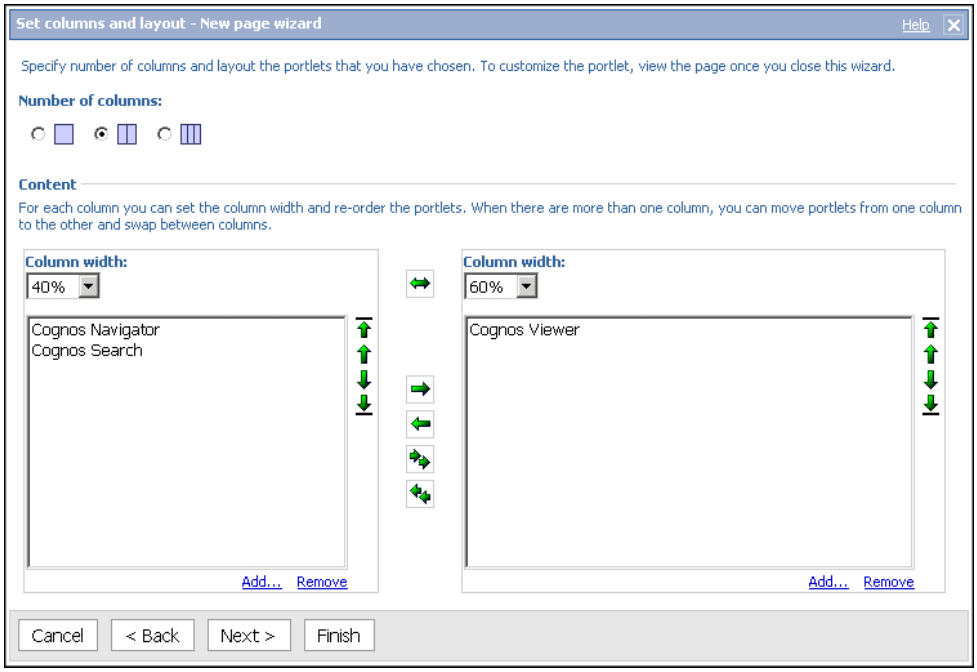
1. Open Cognos Connection:
   - Start your Web browser.
   - In the address bar, type the URL supplied by your administrator, and then press Enter. The URL looks something like this:

     http://*servername*/cognos8
2. In the **Cognos 8 Welcome** page, click **Cognos content**.

   Click the new page button .
3. Type the name **My Great Outdoors page**, click **Select My Folders** as the location for the new page, and click **Next**.
4. Specify the page layout:
   - Under **Number of columns**, select 2 columns.
   - Change the width of the left column to 40% and the right column to 60%.
5. Add content to your page:
   - Under the left column, click **Add**.

- Click **Cognos Content**.
- Select the **Cognos Navigator**, **Cognos Search**, and **Cognos Viewer** portlets, and click the arrow to move them to the **Selected entries** box.

  Tip: You can preview the content of the portlets by clicking the view this portlet button in the **Actions** column.
- Click **OK**.
- In the left column, click **Cognos Viewer** and click the move one item right arrow.


Set columns and layout - New page wizard
Help
Specify number of columns and layout the portlets that you have chosen. To customize the portlet, view the page once you close this wizard.
Number of columns:
Content
For each column you can set the column width and re-order the portlets. When there are more than one column, you can move portlets from one column to the other and swap between columns.
Column width:
40%
Cognos Navigator
Cognos Search
Add... Remove
Column width:
60%
Cognos Viewer
Add... Remove
Cancel
< Back
Next >
Finish

- Click **Next**.

6. Define the appearance of the page:
   - In the **Title** box, type **My Great Outdoors page**.

     Tip: You can change the formatting of the text.
   - Click **Next**.
   - Select the **Add this page to the portal tabs** check box.
   - Click **Finish**.

   The My Great Outdoors Page that you created appears as a tab in Cognos Connection.
7. Enhance the content of your page:
   - Click the **My Great Outdoors Page** tab.
   - In the **Cognos Viewer** portlet, click the edit button.

- Under **Entry**, click **Select an entry**, and select the **Return Quantity by Product Line Chart** sample report.

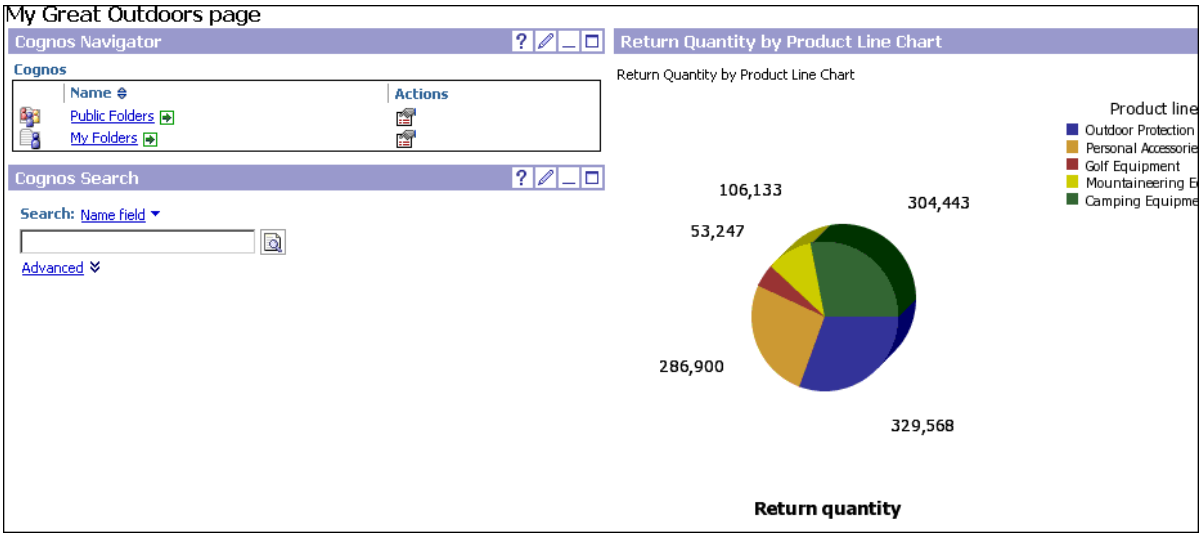
  Tip: You can find this report in **Public Folders** > **GO Data Warehouse (analysis)** > **Query Studio Report Samples**. You can also use any other sample report.

- Under **Portlet height in pixels**, type 600.

- Click **OK**.

  The report now appears in the right column of your portal page.

  If the report was not previously run and saved, click the run button in the **Cognos Viewer** portlet. In the **Run with options** page, click **Save the report** and then click **Run**.



Try on Your Own

- Set the My Great Outdoors Page as your home page:

  Tip: Next to the home icon, click the down arrow, and click **Set View as Home**.

- Delete the page:

  Tip: From the tab menu button, on the left side of the tab bar, click **Remove this tab**.

For More Information

For information about creating portal pages, see the Cognos Connection online help.

Example - Create a Query

Use Query Studio to retrieve information from a data source, when you want to create reports that answer simple business questions. Also use Query Studio to publish reports for audiences who do not require complex layout or formatting.

In this exercise, you will learn how to

- add columns
- add calculations
- add conditional formatting
- apply a template to the report
- save the report

You are a business analyst for the Great Outdoors Company. You want to create a report that shows which products have the highest rate of return and how much revenue was lost from product returns.

To perform this exercise, you must have the appropriate licensing and security permissions.

Things to Notice

Data that can be added to the report has a different icon depending on what type of data it is.

The reports that you create in Query Studio can be viewed and edited in Report Studio.

At any time, you can click the arrow next to the help button, and click **Go to the Welcome Page** to return to the **Cognos 8 Welcome** page.

Steps

1. Open Cognos Connection:
   - Start your Web browser.
   - In the address bar, type the URL supplied by your administrator, and then press Enter. The URL looks something like this:

     http://*servername*/cognos8
2. In the **Cognos 8 Welcome** page, click **Query my data**, and select the **GO Data Warehouse (analysis)** package.

   A blank report appears.
3. Add columns to the report:
   - From the **Menu**, click **Insert Data**.
   - Expand **Sales and Marketing (analysis)**, expand **Sales**, **Product**, and drag **Product type** and **Base product** to the work area.

     The work area is the area within a studio that contains the report, analysis, query or agent currently being used.
   - From **Sales**, expand **Sales fact**, and drag **Quantity** and **Unit cost** to the work area.

     The item **Unit cost** will not appear in the final report, but you need it to build a calculation.
   - Expand **Returned items**, and **Returned items**, and drag **Return quantity** to the work area.
4. Create a calculation to show the lost revenue (**Return quantity * Unit cost = Lost revenue**):

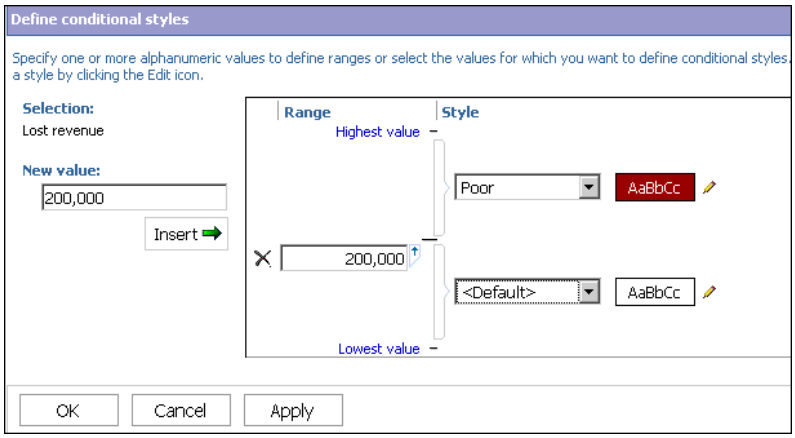
- Select the column headings that you want for the calculation. In the work area, click the heading for **Return quantity** and Ctrl+click the heading for the **Unit cost** column.
- Click the calculate button .
- In the **Operation** box, select * (**multiplication**).
- In the **New item name** box, type **Lost revenue**.
- Click **Insert**.
- Delete the **Unit cost** column.

5. Format the calculated column that you added:
   - Right-click the heading for the **Lost revenue** column and click **Format Data**.
   - In the **Category** list, click **Currency**.
   - In the **Thousands separator** list, click **Yes**, and then click **OK**.

Product type	Base product	Quantity	Return quantity	Lost revenue
Cooking Gear	TrailChef Water Bag	4,308,828	39,569	$109,621.21
Cooking Gear	TrailChef Canteen	965,723	7,043	$48,736.84
Cooking Gear	TrailChef Kitchen Kit	866,669	10,356	$163,459.27
Cooking Gear	TrailChef Cup	1,812,123	23,007	$19,611.30

6. Create a calculation to show the percentage of returns (**Return quantity / Quantity**)*100):
   - In the work area, click the heading for the **Return quantity** column and Ctrl+click the heading for the **Quantity** column.
   - Click the calculate button.
   - In the **Operation type** box, select **Percentage**.
   - The content of the **Operation** box changes to **%**.
   - In the **New item name** box, type **% Returned**.
   - Click **Insert**.
7. Sort the **% Returned** column in descending order:
   - Right-click the heading for the **% Returned** column and click the sort button .
   - Under **Sort order**, click **Descending (9 to 1)**, and then click **OK**.
8. Apply conditional formatting to highlight products with a lost revenue greater than $200,000.
   - Click the heading for the **Lost revenue** column.
   - From the **Menu**, click **Change Layout**, and click **Define Conditional Styles**.
   - In the **New value:** box, type **200000** and click **Insert**.

- For the first range, in the **Style** column, select **Poor**, and click **OK.**



The cells with a lost revenue greater than $200,000 appear with a red background.

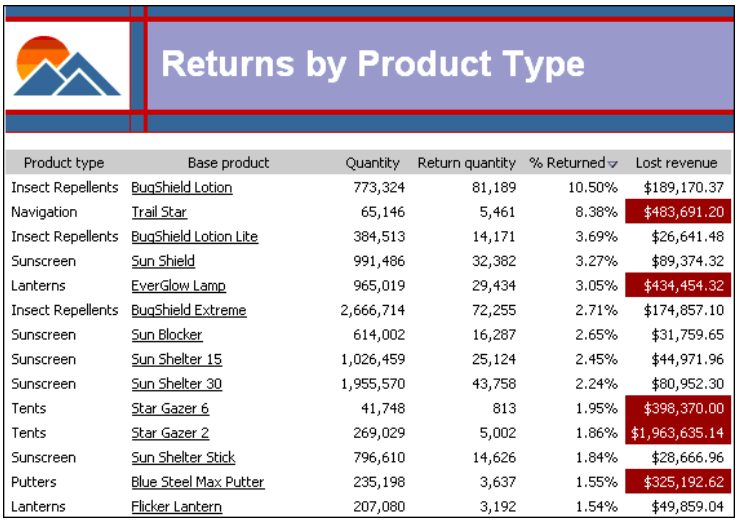
9. Apply a template to the report:
   - From the **Menu**, click **Change Layout**, and click **Apply Template**.
   - Select **Apply a template** and click **Select a template**.
   - In **Public Folders**, click **Sample Template**, select **Great Outdoors Template**, and click **OK** twice.

   The report appears with the styles from the template.

10. Add a title to the report:
    - Above the report, click the report title.
    - In the Title box, type **Returns by Product Type** and click **OK**.

11. Save the report:
    - From the toolbar, click the save button.
    - In the **Name** box, type **Returns by Product Type**.
    - Accept the default save location and click **OK**.

    The final report looks like this.



Returns by Product Type

Product type	Base product	Quantity	Return quantity	% Returned	Lost revenue
Insect Repellents	BugShield Lotion	773,324	81,189	10.50%	$189,170.37
Navigation	Trail Star	65,146	5,461	8.38%	$483,691.20
Insect Repellents	BugShield Lotion Lite	384,513	14,171	3.69%	$26,641.48
Sunscreen	Sun Shield	991,486	32,382	3.27%	$89,374.32
Lanterns	EverGlow Lamp	965,019	29,434	3.05%	$434,454.32
Insect Repellents	BugShield Extreme	2,666,714	72,255	2.71%	$174,857.10
Sunscreen	Sun Blocker	614,002	16,287	2.65%	$31,759.65
Sunscreen	Sun Shelter 15	1,026,459	25,124	2.45%	$44,971.96
Sunscreen	Sun Shelter 30	1,955,570	43,758	2.24%	$80,952.30
Tents	Star Gazer 6	41,748	813	1.95%	$398,370.00
Tents	Star Gazer 2	269,029	5,002	1.86%	$1,963,635.14
Sunscreen	Sun Shelter Stick	796,610	14,626	1.84%	$28,666.96
Putters	Blue Steel Max Putter	235,198	3,637	1.55%	$325,192.62
Lanterns	Flicker Lantern	207,080	3,192	1.54%	$49,859.04

You notice that the Star Gazer 2 tent is the product that has the highest lost revenue rate.

Try on Your Own

- Every time you modify a report, Query Studio updates the results by running a query. Use the run options to preview the report with no data. From the **Run Report** menu, click **Preview with No Data**.

  Tip: To preview a report with limited data, design filters must be defined in the model.

- Review the definition of all report items in the report. From the **Manage File** menu, click **Report Definition**. This is useful for troubleshooting a report.

For More Information

For information about using Query Studio, see the Query Studio online help.

Example - Create a Statement-Style Report

Use Report Studio Express authoring mode for financial report authoring, such as creating and maintaining statement-style reports. Financial authoring requires many but not all of the features that already exist in Report Studio, combined with a more intuitive user experience, and interaction with live data.

The user interactions in Report Studio have been streamlined, which simplifies the process of creating statement-style reports. Only features essential to statement authoring are exposed in the Report Studio Express authoring mode. The Report Studio Express authoring mode does not expose the query interface or property page, and the toolbox contains a simplified set of items. A template featuring an appropriate starting point for financial report creation is offered out of the box.

In this exercise, you will learn how to create a statement-style report.

You are a report author in the finance department of the Great Outdoors Company. You create a balance sheet that shows the assets, liability, and equity for the company over the last few years.

To perform this exercise, you must have the appropriate licensing and security permissions for this functionality.

Things to Notice

When you use the Report Studio Express authoring mode, data is live. You do not have to run a report to see the data. From the **View** menu, you can switch between the **Page Design** and **Page Preview** views to see the live data and the design of your report.

At any time, you can click the arrow next to the help button, and click **Go to the Welcome Page** to return to the **Cognos 8 Welcome** page.

Steps

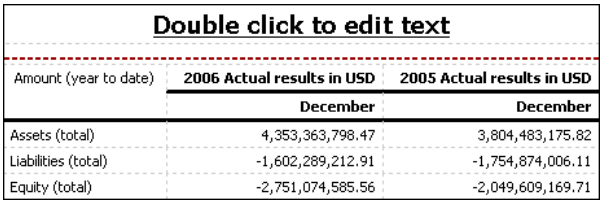
1. Open Cognos Connection:
   - Start your Web browser.
   - In the address bar, type the URL supplied by your administrator, and then press Enter. The URL looks something like this:

     http://*servername*/cognos8
2. In the **Cognos 8 Welcome** page, click **Create professional reports**.
3. Click the **GO Data Warehouse (analysis)** package.
4. Click **Create a new report**, click **Financial**, and click **OK**.

   Tip: If you are in Report Studio Professional, switch to Report Studio Express for this example. From the **View** menu, click **Authoring Mode**, and click **Express**.
5. Insert data in the crosstab zones:
   - In the **Insertable Objects** pane, expand **Finance (analysis)**, **Finance**, **Account**, **Account(All)**, and **Balance sheet (total)**.
   - From **Balance sheet (total)**, drag **Assets (total)** to the **Rows** zone.
   - From **Balance sheet (total)**, expand **Liabilities & equities (total)**, and drag both **Liabilities (total)** and **Equity (total)** to the **Rows** zone, under the **Assets (total)**.

     Tip: When you drag an object to the crosstab, you will see a flashing horizontal or vertical bar. This indication tells you where, in the crosstab, the item will be placed.
   - In the **Insertable Objects** pane, expand **Submission**, and **Submission(All)**, and drag **2006 Actual results in USD** to the **Columns** zone.
   - Drag **2005 Actual results in USD** to the **Columns** zone, to the right of **2006 Actual results in USD**.
   - In the **Insertable Objects** pane, expand **Time dimension**, **Time dimension(All)**, **2006**, and **Q4**, and drag **December** to the **Columns** zone, under the **2006 Actual results in USD**.
   - Repeat these steps for the 2005 year.

- From **Finance (analysis)**, expand **Finance**, and **Finance fact**, and drag **Amount (year to date)** to the **Measures** zone.



Double click to edit text

Amount (year to date)	2006 Actual results in USD	2005 Actual results in USD
	December	December
Assets (total)	4,353,363,798.47	3,804,483,175.82
Liabilities (total)	-1,602,289,212.91	-1,754,874,006.11
Equity (total)	-2,751,074,585.56	-2,049,609,169.71

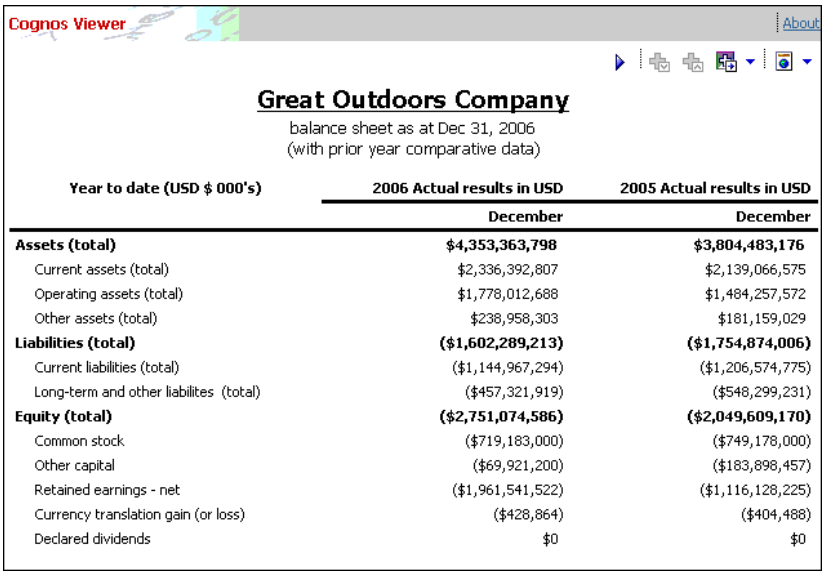
6. Expand the rows to view the company's breakdown of assets, liabilities, and equity:
   - In the report, double-click **Assets (total)** to examine the members of the company's assets.
   - Repeat for **Liabilities (total)** and **Equities (total)**.
7. Change the title of the report to reflect the contents of the balance sheet:
   - Double-click the heading title, type **Great Outdoors Company**, and click **OK**.
   - In the **Toolbox** tab, drag the **Block** object under the **Great Outdoors Company** title. Repeat the steps to add a second block underneath the first.
   - In the **Toolbox** tab, drag the **Text Item** object inside the first block object. When the **Text** dialog box appears, type **balance sheet as at Dec 31, 2006**, and click **OK**.
   - Repeat the steps to add a second text item object to the second block object. In the **Text** dialog box, type (**with prior year comparative data**), and click **OK**.
   - Ctrl+click both block objects, and, using the toolbar, center and bold the text.
   - From the toolbar, change the font to size **10 pt**.
8. Change the currency format of the balance sheet:
   - In your report, under the **2005 Actual results in USD**, under **December**, use Shift+click to select the whole column.
   - Right-click the selection, click **Style**, and click **Data Format**.
   - In the **Format type** list, select **Currency**.
   - In the **Properties** pane, for the **Currency** property, select **$(USD) - United States of America**.
   - For the **No. of Decimal Places** property, select **0**.
   - Click **OK**.

Great Outdoors Company

balance sheet as at Dec 31, 2006
(with prior year comparative data)

Amount (year to date)	2006 Actual results in USD	2005 Actual results in USD
	December	December
Assets (total)	$4,353,363,798	$3,804,483,176
Current assets (total)	$2,336,392,807	$2,139,066,575
Operating assets (total)	$1,778,012,688	$1,484,257,572
Other assets (total)	$238,958,303	$181,159,029
Liabilities (total)	($1,602,289,213)	($1,754,874,006)
Current liabilities (total)	($1,144,967,294)	($1,206,574,775)
Long-term and other liabilites (total)	($457,321,919)	($548,299,231)
Equity (total)	($2,751,074,586)	($2,049,609,170)
Common stock	($719,183,000)	($749,178,000)
Other capital	($69,921,200)	($183,898,457)
Retained earnings - net	($1,961,541,522)	($1,116,128,225)
Currency translation gain (or loss)	($428,864)	($404,488)
Declared dividends	$0	$0

9. Repeat these steps for the column under 2006 by using the pick up style button .
   - To copy all the formatting applied to the item, click the pick up style button, click the items that you want to format, and then click the apply style button .
   - To copy only one of the formatting styles, click the down arrow to the right of the pick up style button and click the style that you want to copy. Then, click the item that you want to format and click the apply style button.
   - If you want to make changes to a style that you copied, click the down arrow to the right of the pick up style button and click **Edit Dropper Style**. In the **Style** dialog box, specify basic and advanced style characteristics, and then click **OK**.
10. Change text formatting to reflect a standard balance sheet:
    - Ctrl+click to select the entire row for **Assets** (**total**). Using the toolbar, change the text to bold.
    - Select the entire rows for **Liabilities** (**total**) and **Equity** (**total**) and change the text to bold.
    - Right-click **Amount** (**year to date**) and click **Override Default Text**. In the text box, type **Year to date** (**USD $000's**), and click **OK**.
    - Select **Year to date** (**USD $000's**), and using the toolbar, change the text to bold.
11. From the **Run** menu, click **Run Report - HTML**.



Great Outdoors Company

balance sheet as at Dec 31, 2006
(with prior year comparative data)

Year to date (USD $ 000's)	2006 Actual results in USD	2005 Actual results in USD
	December	December
Assets (total)	**$4,353,363,798**	**$3,804,483,176**
Current assets (total)	$2,336,392,807	$2,139,066,575
Operating assets (total)	$1,778,012,688	$1,484,257,572
Other assets (total)	$238,958,303	$181,159,029
Liabilities (total)	**($1,602,289,213)**	**($1,754,874,006)**
Current liabilities (total)	($1,144,967,294)	($1,206,574,775)
Long-term and other liabilites (total)	($457,321,919)	($548,299,231)
Equity (total)	**($2,751,074,586)**	**($2,049,609,170)**
Common stock	($719,183,000)	($749,178,000)
Other capital	($69,921,200)	($183,898,457)
Retained earnings - net	($1,961,541,522)	($1,116,128,225)
Currency translation gain (or loss)	($428,864)	($404,488)
Declared dividends	$0	$0

For More Information

For information about using Report Studio Express, see the Report Studio Express Authoring *User Guide*.

Example - Create a Report

Use Report Studio to create reports with complex layout, formatting, and report user interactions. These types of report are generally created by professional report authors, who have a good knowledge of the data and tools they work with.

In this exercise, you will learn how to

- create a chart
- make the report interactive with prompts

You are a business analyst for the Great Outdoors Company. You create a chart report in Report Studio to show the performance of returns over the last few years. You make the report interactive by adding a prompt.

You will create a report that looks like the Report Studio sample **Returns by Order Method - Prompted Chart** in the GO Sales sample package

To perform this exercise, you must have the appropriate licensing and security permissions for this functionality.

Things to Notice

When you use Report Studio, data is not live. You must run the report to view data.

You can view the XML report specification.

You can add multilingual capabilities.

At any time, you can click the arrow next to the help button, and click **Go to the Welcome Page** to return to the **Cognos 8 Welcome** page.

Steps

1. Open Cognos Connection:
   - Start your Web browser.
   - In the address bar, type the URL supplied by your administrator, and then press Enter. The URL looks something like this:

     http://*servername*/cognos8
2. In the **Cognos 8 Welcome** page, click **Create professional reports**.
3. Click the **GO Data Warehouse (analysis)** package.
4. Click **Create a new report or template**, click **Crosstab**, and click **OK**.

   Tip: If you are in Report Studio Express, switch to Report Studio Professional for this example. From the **View** menu, select **Authoring Mode**, and click **Professional**.
5. Insert data in the crosstab zones:
   - In the **Insertable Objects** pane, expand **Sales and Marketing (analysis)**, **Returned items**, **Return reason** and **Return reason**.
   - Drag **Return reason** to the **Columns** zone.
   - In the **Insertable Objects** pane, expand **Returned items** and **Returned items**.
   - Drag **Return quantity** to the **Measures** zone.
   - In the **Insertable Objects** pane, expand **Inventory**, **Product**, and **Product**.
   - Drag **Product line** to the **Rows** zone.

Return quantity	<#Return reason#>	<#Return reason#>
<#Product line#>	<#1234#>	<#1234#>
<#Product line#>	<#1234#>	<#1234#>

6. Click the run report button to run your report and verify the content.

   The report output appears in Cognos Viewer.

   Tip: To return to Report Studio, close the Cognos Viewer Web browser.

Return quantity	Wrong product shipped	Incomplete product	Unsatisfactory product	Wrong product ordered	Defective product
Golf Equipment	13,105	5,817	10,068	18,036	6,221
Outdoor Protection	7,210	374	230,481	12,152	79,351
Camping Equipment	52,199	57,043	61,549	97,606	36,046
Mountaineering Equipment	30,765	8,176	27,012	24,688	15,492
Personal Accessories	98,875	26,808	34,934	79,993	46,290

7. Insert another column in the report:
   - In the **Insertable Objects** pane, expand **Sales**, **Time dimension**, and **Time dimension**.

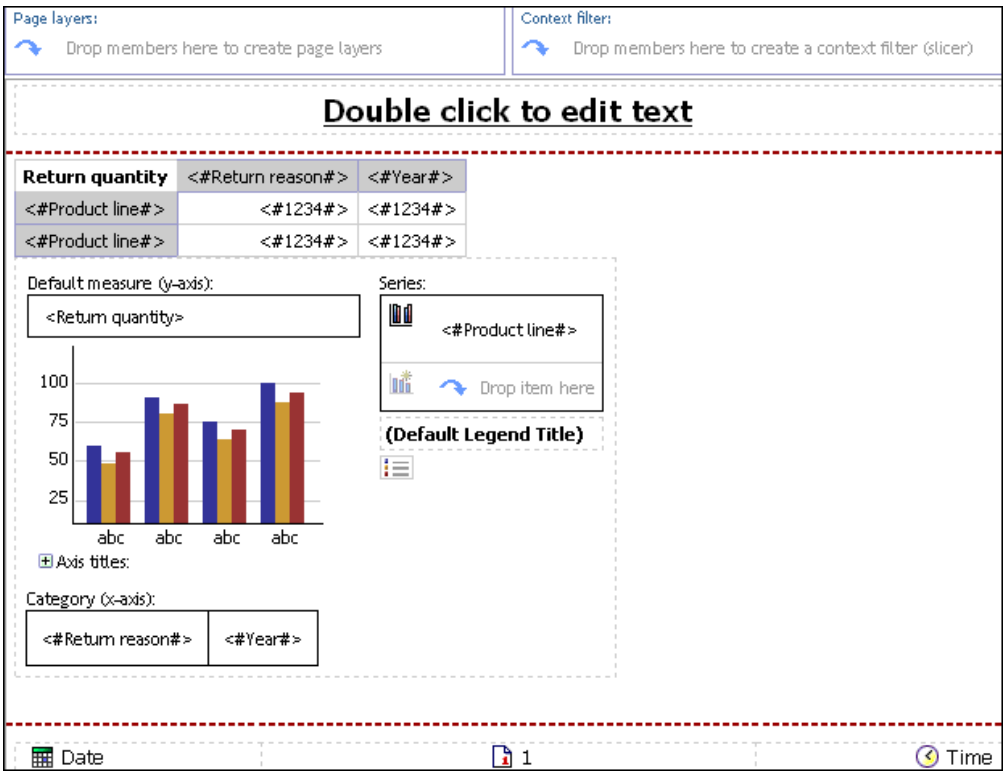
- Drag **Year** to the column after the **Return reason** column.

8. Insert a chart in the report:

   - In the **Insertable Objects** pane, click the toolbox tab .
   - Drag the **Chart** object below the crosstab.
   - In the **Insert Chart** dialog box, in the **Chart** pane, click the **Column** chart type, and click **OK**.
   - Click the chart to select it, and in the **Properties - Combination Chart** pane on the left, in the **Data** properties, select the **Query** property.
   - Select **Query1** from the list.

     Tip: When you change the **Query** property to the query that you used for the crosstab, it is easier for you to find and reuse the same data items for the chart.

   - In the **Insertable Objects** pane, click the data items tab .
   - Drag **Return quantity** to the **Default measure (y-axis)**, **Product line** to the **Series**, and **Return reason** and **Year** to the **Category (x-axis)**.



9. Create a filter to exclude the **Wrong product ordered** return reason from the crosstab:

   - In the crosstab, click the **Return reason** column heading.
   - On the toolbar, click the filter button .
   - Click the **Detail Filters** tab.

- Click the add button .
- Define the following expression:

  [Return reason] not in ([Returned items].[Return reason].[Return reason].[Return reason] ->[all].[9003])

  Tip: Insert items from the **Available Components** pane. The value 9003 is the code for the **Wrong product ordered** return reason.

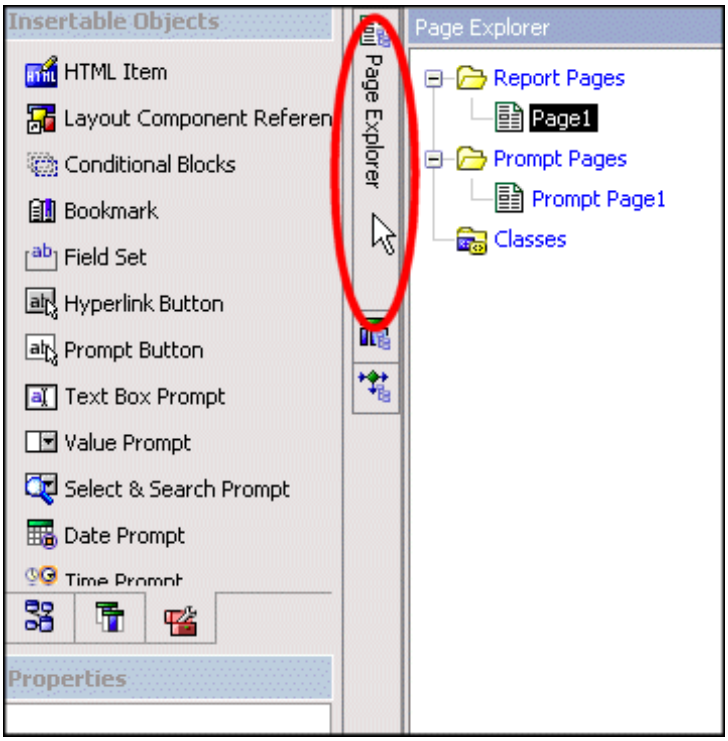
- Click the validate button to validate your expression.
- Click **OK** twice.

10. Create a prompt page for the order method to allow users to filter data in the report and retrieve data only for the order method they select:
    - Click the background of the work area to deselect.
    - From the **Tools** menu, click **Build Prompt Page**.
    - Use Ctrl+click to select the **Back** and **Next** buttons, and the **Double click to edit text** prompt page title, that are automatically created, and delete them.
    - In the **Insertable Objects** pane, click the toolbox tab .
    - Drag the **Value Prompt** object and drag it in the prompt page.

      The **Prompt Wizard - Value Prompt** dialog box appears.

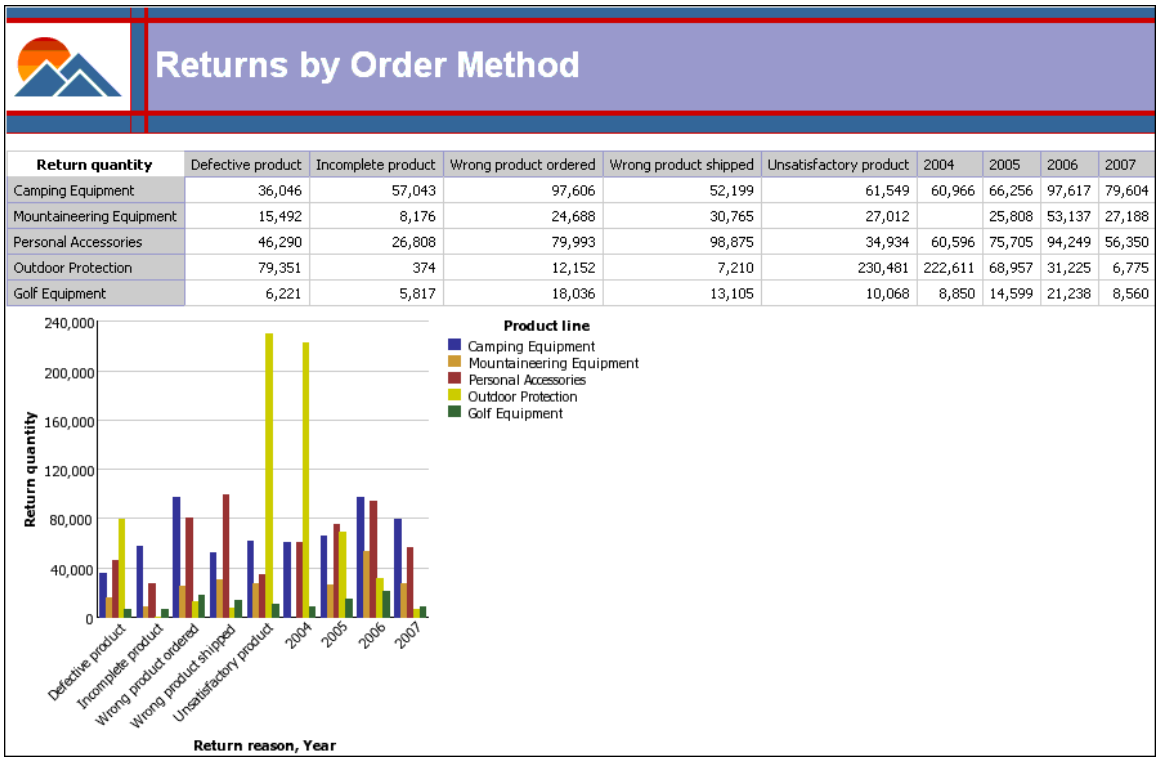
    - Click **Next**.
    - Beside the **Package item** box, click the ellipsis button (...).
    - In the **Choose Package Item** dialog box, expand **Sales and Marketing (analysis)**, **Sales**, **Order method**, and **Order method dimension**.
    - Click the lowest-level **Order method dimension** and then click **OK**.
    - Click **Next** twice to accept the defaults, and click **Finish**.
11. Move the cursor over the **Page Explorer** between the **Insertable Objects** pane and the work area, and in **Report Pages**, click **Page1** to return to the report page.

    Tip: Click the **Prompt Pages** folder title to remove or rename a page or to edit properties.



12. Add a title to the report:
    - Double-click the **Double click to edit text** title area, type **Returns by Order Method**, and click **OK**.
13. Save the report:
    - From the **File** menu, click **Save As**.
    - Name the report **Returns by Order Method - Prompted Chart** and click **Save**.
14. Run your report and verify the content,
    - Click the run report button .
    - In the **Order method dimension** drop down list, click **E-mail** and then click **Finish**.

      The report output appears in Cognos Viewer.



Try on Your Own

- Save the report as a template so you can create a new report with the same layout and include different data.

  Tip: From the **File** menu, click **Convert to Template** and then save the report with a new name.

- Change the color of the background of the chart.

  Tip: In the work area, click the chart. In the **Properties** pane, expand **Color & Background**, and click the ellipsis (...) next to **Background Color**.

- View the XML specification for the report.

  Tip: From the **Tools** menu, click **Show Specification**.

For More Information

For information about using Report Studio, see the Report Studio Professional Authoring *User Guide*.

Example - Manage an Event

Use Event Studio to define business events or exceptional conditions in your data that you must deal with. Create agents to monitor your data and notify decision-makers in your organization of events as they happen, so that they can make timely and effective decisions. You create agents to perform tasks or deliver alerts when the data meets predefined thresholds.

This exercise shows how to

- define business events
- define agent tasks
- review the status of events

You are a business analyst for the Great Outdoors Company. You want to ensure that your customers are satisfied with the products and services that you provide. In particular, if products are returned, you want to investigate why, and ensure that you offer a replacement before your customers decide to shop elsewhere.

Using Event Studio, you can be notified whenever a customer returns a product because it was defective, unsatisfactory, incomplete, or because the wrong product was shipped to them. You want to immediately send an email to your customer service department with details about the order and the customer so that they can contact the customer.

You will create an agent that looks like the Event Studio sample **Returns Agent** in the **GO Sales (query)** sample package.

To perform this exercise, you must have the appropriate licensing and security permissions.

Things to Notice

The tasks that you need to perform to create an agent in Event Studio appear in the **I want to...** area in the left pane. By default, when you open Event Studio, you start with the first task, defining an event.

At any time, you can click the arrow next to the help button, and click **Go to the Welcome Page** to return to the **Cognos 8 Welcome** page.

Steps

1. Open Cognos Connection:
   - Start your Web browser.
   - In the address bar, type the URL supplied by your administrator, and then press **Enter**. The URL looks something like this:

     http://*servername*/cognos8
2. In the **Cognos 8 Welcome** page, click **Manage my events**, and select the **GO Sales (query)** package.
3. Create the expression that defines the event:
   - In the **Insertable Objects** pane, expand **Returned items (query)** and **Returned items**.
   - In the **Insertable Objects** pane, expand **Return reason**.
   - Use both **Return quantity** and **Reason description** to create the following expression:

     [Return quantity]>0 AND [Reason description] IN ('Wrong product shipped','Unsatisfactory product','Incomplete product','Defective product')

Tip: Insert items from the **Insertable Objects** pane. To select from a list of possible values for the return reason, click the select values button . Move the values you want from the **Select Value** box to the **Selected Items** box and click **OK**.

- Click the validate button to validate your expression.

  Tip: You can also click **Preview** from the **Actions** menu to see the data retrieved from the data source.

You defined the expression that will be used to notify you whenever a customer returns a product because it was defective, unsatisfactory, incomplete, or because the wrong product was shipped to them.

4. Create an email task to immediately send an email to your customer service department with details about the returned order and the customer so that they can contact the customer:

   - In the **I want to** list, click **Add a task** and click **Send an email**.
   - In the **To** box, type the email address for the customer service department.

     Tip: Since this example is for learning purposes, the agent will not actually run. Therefore, you can type any email address.
   - In the **Subject**, type **Products Returned**.
   - Above the **Body** box, click the insert table button and add four columns and two rows.
   - In order to add any content to the table, ensure that the **insert text...** text is deleted from each cell.
   - Add information about returned products to the table as follows:

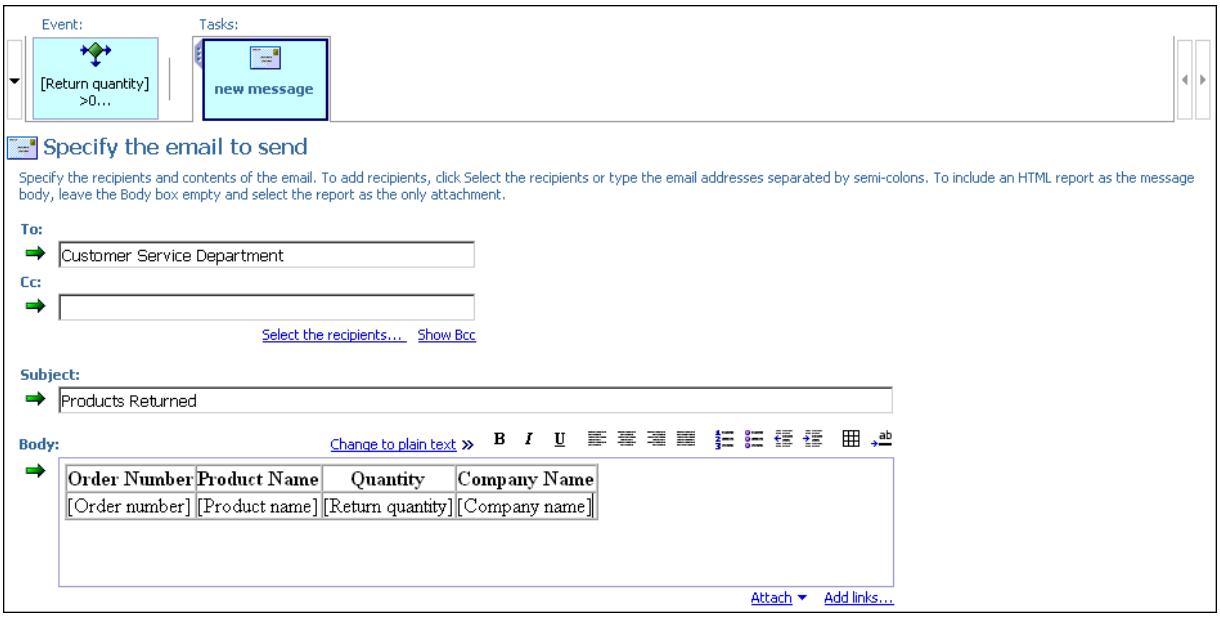
     Manually type in the text for the heading row of the table.

     Drag objects from the **Insertable Objects** pane to the bottom row of the table.

     Tip: From the **Insertable Objects** pane, expand **Returned items (query)**. Expand **Order** to find **Order number**; **Product** for **Product name**; **Returned items** for **Return quantity**, and **Retailer site** for **Company name**.

Order Number	Product Name	Quantity	Company Name
[Order number]	[Product name]	[Return quantity]	[Company name]

     When the agent runs, the data item for each event is replaced by the current value in the package.
   - Select the top row and select the bold button to make the column headings stand out.



5. Set the execution rules so that a notification is sent only for new events:
   - In the **I want to** list, click **Manage the task execution rules**.
   - Click the **Event Key** tab.
   - In the **Insertable Objects** pane, expand **Sales (query)**, **Order**, and drag **Order number** to the **Event key** box.
   - Click the **Event Selection** tab, and under **Select when to perform this task**, ensure that only the **New events** check box is selected.
   - Click **OK**.
6. Set the schedule for when you want to the event to run:
   - In the **I want to** list, click **Schedule the agent**.
   - In the **Set the schedule** pane, under **Frequency**, click the **By Day** tab, and select **Every 1 hour(s)**.
   - Click **OK**.
7. Save the agent as **Returns Agent**.

Each hour, the agent runs and the next time a customer returns a product, an email is sent to the customer service department with information about the order.

Try on Your Own

- Attach the event list to the email. An event list shows the events processed by the agent. In this example, the event that we defined is when a customer returns a product.

  Tip: In the summary area, click the **Products Returned** email task. Below the **Body** box, click **Attach**, and click **Attach the event output**.

- Add a report task so that the agent runs a report that is related to an important business event.

  Tip: In the **I want to** area, click **Add a task**, and click **Run a report**. Then, select the report that you want to run.

  To allow this report to be attached in an email task, under **Options**, click **Set**, and then select the **Override the default values** check box. Under **Delivery**, select the **Enable attachment of the report in email tasks** check box, and click **OK**.

- Attach a report to the email. You can only attach reports that are included in report tasks and that have the **Enable attachment of the report in email tasks** check box selected.

  Tip: In the summary area, click the **Products Returned** email task. Below the **Body** box, click **Attach**, and click the name of the report that is available to attach.

For More Information

For information about creating agents, see the Event Studio online help.

Example - Monitor Performance

With Metric Studio, you can track the performance of your organization against its goals and objectives. At a quick glance, decision makers at every level of the organization can see the current status of the organization, and then react or plan.

A metric is an indicator of key measures that compares actual results to targets. A metric also records who is responsible for the results and the impact of the metric. A scorecard is a collection of performance metrics and projects that reflects the strategic goals of a unit in an organization.

This exercise shows how to

- review a strategy map for a visual representation of the strategy and the objectives of that strategy for an organization
- review and understand the performance of a metric on a scorecard
- create an action on a metric
- add a metric to your watch list

You are a sales manager for a region for the Great Outdoors Company. You regularly look at a scorecard that contains metrics about your sales area. The metrics give you an instant idea of how the current sales compare to the sales targets set by the company. Return quantity is one of the metrics.

To perform this exercise, you must have the appropriate licensing and security permissions for this functionality.

Things to Notice

Metrics appear as either Poor (red), Average (yellow), or Excellent (green).

For each metric, you can see whether the trend is getting better or getting worse.

When you move your pointer over the title of a metric, you see a history chart that shows the performance of the metric. A flyout menu extends when you mouse over a metric or a diagram.

At any time, you can click the arrow next to the help button, and click **Go to the Welcome Page** to return to the **Cognos 8 Welcome** page.

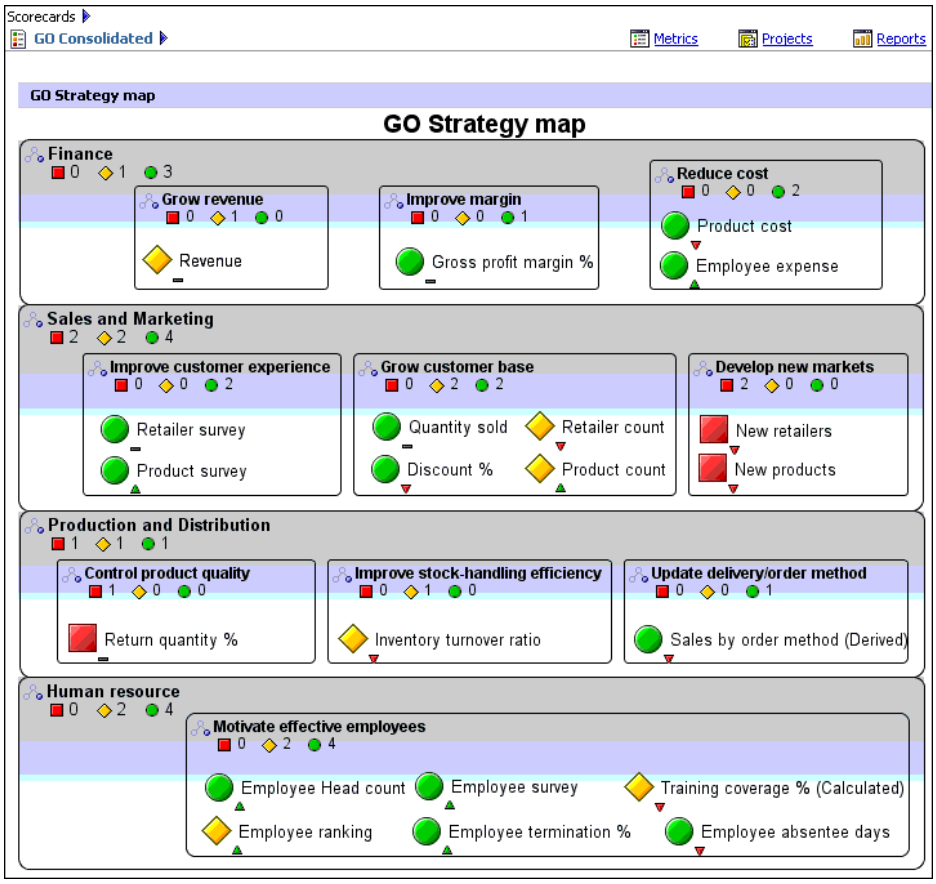
Steps

1. Open Cognos Connection:
   - Start your Web browser.
   - In the address bar, type the URL supplied by your administrator, and then press Enter. The URL looks something like this:

     http://*servername*/cognos8
2. In the **Cognos 8 Welcome** page, click **Manage my metrics**, and select the **GO Metrics** package.
3. View the strategy map:
   - On the left pane, click the **Scorecards** tab, and click the **GO Consolidated** scorecard.
   - On the right pane, click the **Diagrams** tab.

   In the **GO Strategy map**, notice how you can quickly evaluate the performance of each of the goals of the organization. The large indicators show the status for a specific strategy. The smaller indicators that appear below a strategy show the trend. The values for metrics that are not performing well appear in red. Status and trend indicators that appear in red indicate possible problem areas.

   For example, in the **Production & Distribution** function of the strategy map, in the **Control Product Quality** metric, the value for **Return Quantity %** is red, which shows a poor performance metric.



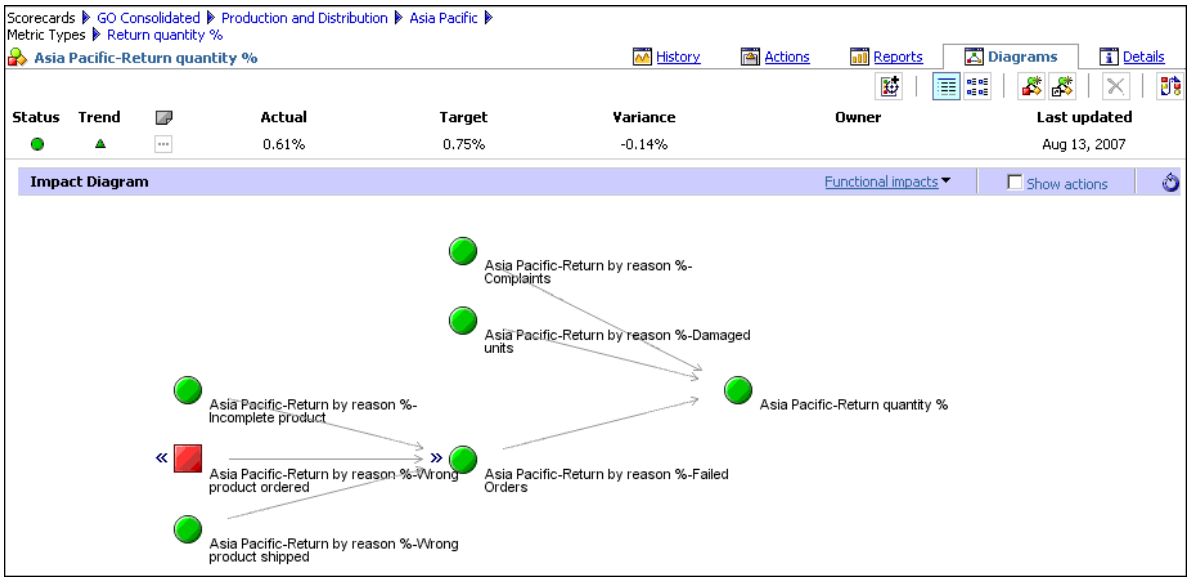
4. Explore the scorecard:

   - On the left pane, click **Scorecards**.
   - Expand the **GO Consolidated** scorecard.

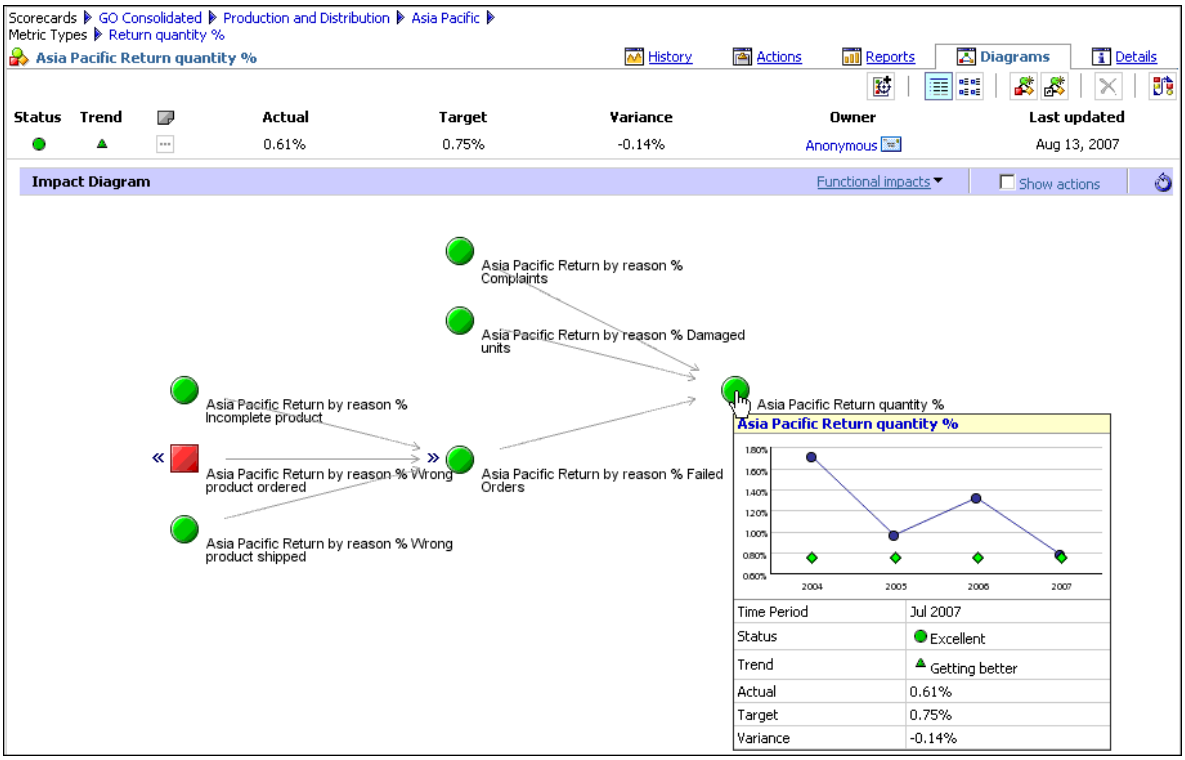
     You see the Great Outdoors Company has scorecards for each of the four functions of the company: Finance, Sales and Marketing, Production and Distribution, and Human resource.
   - Expand the **Production and Distribution** scorecard and click **Asia Pacific**.
   - Click the **Metrics** tab.

     All the metrics associated with the Asia Pacific region are shown. Notice that the **Asia Pacific Return by reason % Wrong product ordered** metric is red. You may want to explore this metric further to see what might be causing this trend.
   - Click the **Asia Pacific-Return quantity %** and click **Diagrams** tab.
   - Expand the metrics in the diagram by clicking the arrow to the left of the **Asia Pacific-Return by reason %-Failed orders** metric.

     You can see what data makes up the **Return quantity %** metric. You can also see which return reason has a critical issue.

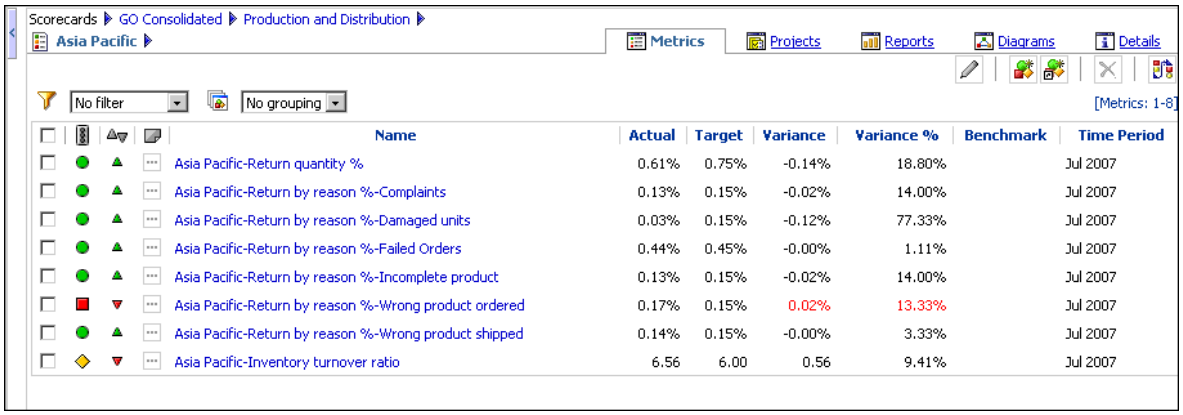


- Hold your mouse over **Asia Pacific-Return quantity %** to see more information about that metric.



- In the left pane, in the **Production and Distribution** scorecard, click the **Asia Pacific**, and click the **Metrics** tab to view the metric related to return quantity.

  Notice that the status of **Asia Pacific-Return by reason %-Wrong product ordered** metric is poor.



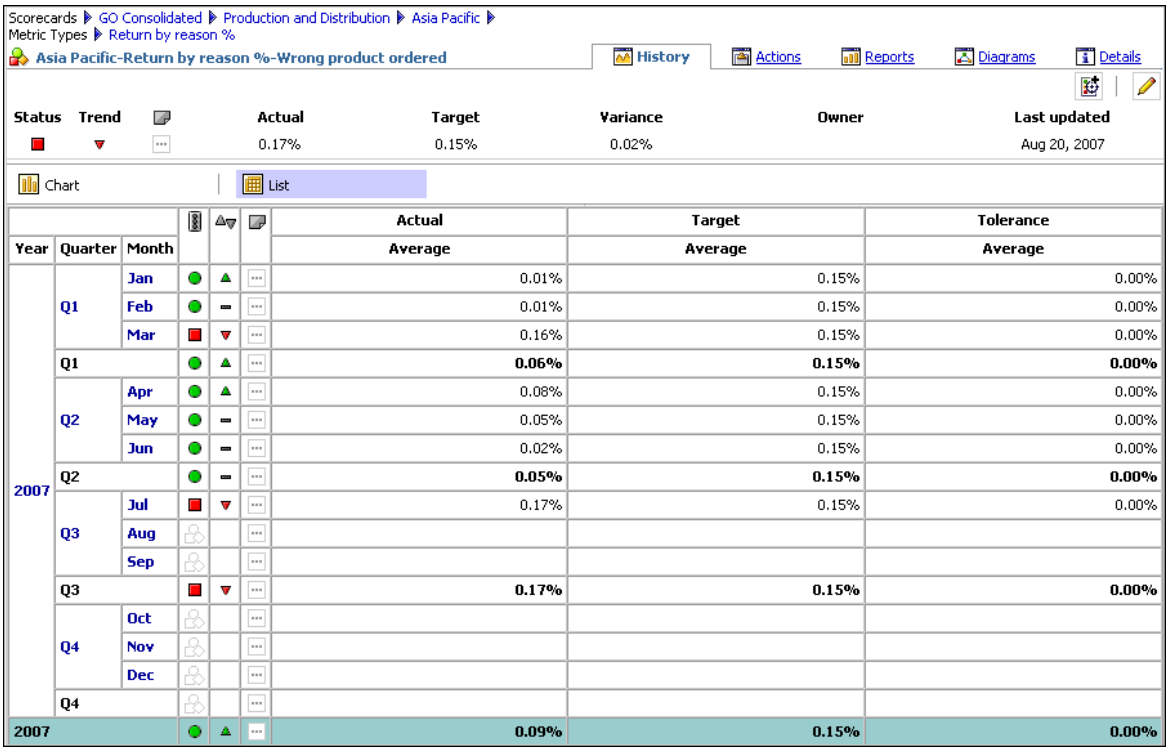
Name	Actual	Target	Variance	Variance %	Benchmark	Time Period
Asia Pacific-Return quantity %	0.61%	0.75%	-0.14%	18.80%		Jul 2007
Asia Pacific-Return by reason %-Complaints	0.13%	0.15%	-0.02%	14.00%		Jul 2007
Asia Pacific-Return by reason %-Damaged units	0.03%	0.15%	-0.12%	77.33%		Jul 2007
Asia Pacific-Return by reason %-Failed Orders	0.44%	0.45%	-0.00%	1.11%		Jul 2007
Asia Pacific-Return by reason %-Incomplete product	0.13%	0.15%	-0.02%	14.00%		Jul 2007
Asia Pacific-Return by reason %-Wrong product ordered	0.17%	0.15%	0.02%	13.33%		Jul 2007
Asia Pacific-Return by reason %-Wrong product shipped	0.14%	0.15%	-0.00%	3.33%		Jul 2007
Asia Pacific-Inventory turnover ratio	6.56	6.00	0.56	9.41%		Jul 2007

5. Click the **Asia Pacific-Return by reason %-Wrong product ordered** metric.

   In Metric Studio, the tabs represent the questions you might ask yourself, as you try to solve a problem or understand a piece of information.

6. On the right pane, click the **History** tab, and click **List**.

   The information in the **History** tab answers the question "When?". You see the actual and target values for the metric data for previous periods. You also see quarterly and yearly summaries.



Status	Trend	Actual	Target	Variance	Owner	Last updated
		0.17%	0.15%	0.02%		Aug 20, 2007

Year	Quarter	Month	Actual (Average)	Target (Average)	Tolerance (Average)
2007	Q1	Jan	0.01%	0.15%	0.00%
		Feb	0.01%	0.15%	0.00%
		Mar	0.16%	0.15%	0.00%
	Q1		**0.06%**	**0.15%**	**0.00%**
	Q2	Apr	0.08%	0.15%	0.00%
		May	0.05%	0.15%	0.00%
		Jun	0.02%	0.15%	0.00%
	Q2		**0.05%**	**0.15%**	**0.00%**
	Q3	Jul	0.17%	0.15%	0.00%
		Aug			
		Sep			
	Q3		**0.17%**	**0.15%**	**0.00%**
	Q4	Oct			
		Nov			
		Dec			
	Q4				
2007			**0.09%**	**0.15%**	**0.00%**

7. Explore the information available for the **Asia Pacific-Return by reason %-Wrong product ordered** metric:

   - Click the **Reports** tab.

     The information in the **Reports** tab answers the question "What?" by providing more details about a metric. Metric authors link reports to a metric to help illustrate the reasons

for the status of the metric and to help you solve issues related to the performance of a metric.

- Click the **Diagrams** tab.

  The information in the **Diagrams** tab helps you understand the question "How?" by comparing your metric with other metrics. Impact diagrams show the relationships between the **Return by reason %** metric and other metrics.

- Click the **Details** tab.

  The information in the **Details** tab helps you understand your business and the metrics that you are monitoring. In this tab, you see a description of the metric, how the metric is calculated, who owns the metric, and whether a metric is impacted by other metrics.

8. Create an action for one of your business analysts to have her investigate the performance of product returns:

   - Click the **Actions** tab.
   - Click the new action button .

     Tip: You need to select a metric in order to see the action button.
   - In the **Name** box, type **Kazumi Uragome**, the person who will own the action.
   - In the **Description** box, type **Please investigate** to let Kazumi know what to do.
   - Beside the **Planned Finish** box, click the calendar icon, select a date one week from today, and then click **OK**.

9. Add the **Asia Pacific-Return reason %-Wrong product ordered** metric to your watch list so that you can easily monitor it in the future:

   - Click the **Kazumi Uragome** action check box.
   - On the upper toolbar, click the add to watch list button .
   - In the left pane, click **My Folders** and click **Watch List**.

   The **Asia Pacific-Return by reason %-Wrong product ordered** metric appears in your watch list.

Try on Your Own

- Add a comment to the metric to communicate information to users of the metric.

Tip: Beside the metric, in the comment column, click the ellipsis (...). After you add a comment, a comment icon appears.

- Add an email notification so that you will be notified when the metric changes.

  Tip: Beside the metric, click the email alerts button . The email alerts button changes to show that email alerts is now turned on. You can also specify when and how often you receive email notification about changes to metrics in the watch list, by changing the email alerts properties.

- Filter the scorecard according to the status of the metrics.

  Tip: On the **Metrics** tab, in the filter box, select the status or trend that you want.

For More Information

For more information about using scorecards, see the Metric Studio online help.

Example - Create an Analysis

In Analysis Studio, you can manipulate items in your data interactively so that you can identify and understand the problems and issues in your business.

In this exercise, you will learn how to

- drill down
- create a top filter
- create a summary calculation
- create a crosstab and a chart

You are a business analyst for the Great Outdoors Company. You want to further analyze the returns business items to find out where and why products are the most returned, and which have the biggest impact on the company's profit.

To perform this exercise, you must have the appropriate licensing and security permissions.

Things to Notice

The items and measures that you can add to your analysis appear in the data tree in the left pane.

The overview area above the work area is a convenient place to quickly explore and change the contents of your analysis. You manipulate rows and columns, drill up or down, and provide context for the work area.

Analysis Studio uses sets, which are collections of similar items. You manipulate items by applying actions to sets. You can sort, filter, and nest sets. You can also save custom sets and view subtotals for your sets.

At any time, you can click the arrow next to the help button, and click **Go to the Welcome Page** to return to the **Cognos 8 Welcome** page.

Steps

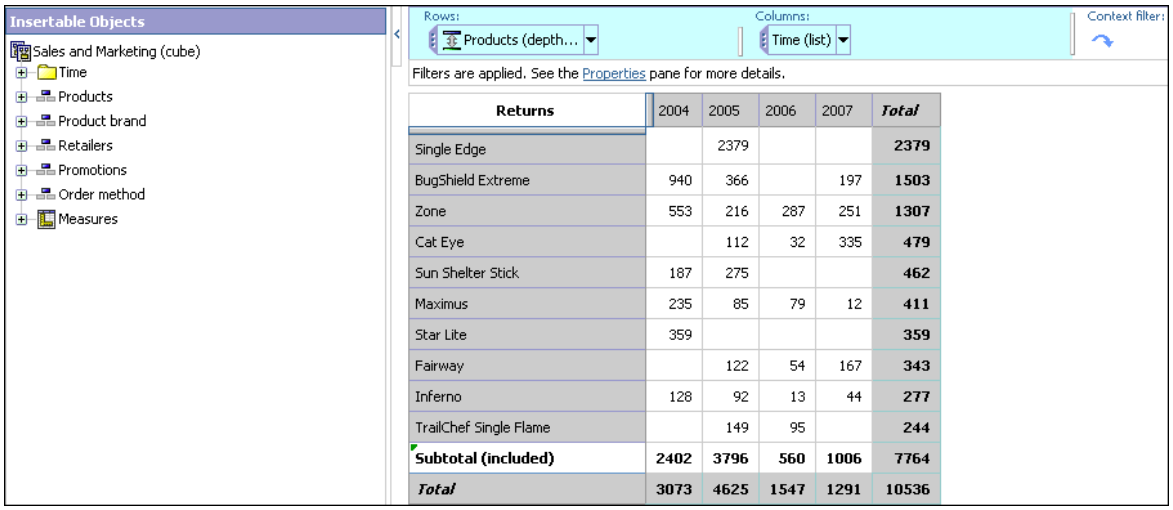
1. Open Cognos Connection:
   - Start your Web browser.
   - In the address bar, type the URL supplied by your administrator, and then press Enter. The URL looks something like this:

     http://*servername*/cognos8
2. In the **Cognos 8 Welcome** page, click **Analyze my business**.
3. Click the **Sales and Marketing (cube)** package.
4. Click **Blank Analysis**, and click **OK**.
5. Insert data in the crosstab:
   - In the **Insertable Objects** pane, expand **Measures** and drag **Returns** to the **Measure** zone or to the upper-left corner of the work area.
   - Drag **Products** to the **Rows** zone.
   - Expand the **Time** folder, and **Time**, and multiselect all four years (**2004**, **2005**, **2006**, **2007**) .
   - Drag all four years to the **Columns** zone.

   You now see the returns for all the product brands over a four year span of time. The total number of returns is visible in the **Total** column. Notice that the year 2007 is not a complete year of data.
6. Filter the top ten product brands based on their total returns over the last four years:
   - In the overview area, right-click **Products** and click **Down a Level**.

     The overview area is located above the work area. You can use the overview area as a convenient place to quickly explore and change the contents of the work area. The overview area shows any applied filters and sorting.
   - Repeat the step to see a list of all individual products.
   - In the overview area, right-click **Products (depth 3)**, click **Top or Bottom**, select **Top**, and click **10**.

     You see that the top ten products are now the only products in the crosstab.



Returns	2004	2005	2006	2007	*Total*
Single Edge		2379			**2379**
BugShield Extreme	940	366		197	**1503**
Zone	553	216	287	251	**1307**
Cat Eye		112	32	335	**479**
Sun Shelter Stick	187	275			**462**
Maximus	235	85	79	12	**411**
Star Lite	359				**359**
Fairway		122	54	167	**343**
Inferno	128	92	13	44	**277**
TrailChef Single Flame		149	95		**244**
Subtotal (included)	**2402**	**3796**	**560**	**1006**	**7764**
Total	**3073**	**4625**	**1547**	**1291**	**10536**

Tip: To use a specific product name rather than having to drill down multiple layers, in the **Insertable Objects** pane, navigate to the product name that you want. Select the product you want, and in the **Information** pane, drag the level name into the crosstab.

7. Create a summary calculation to see what the average returns are per year for the top ten products:

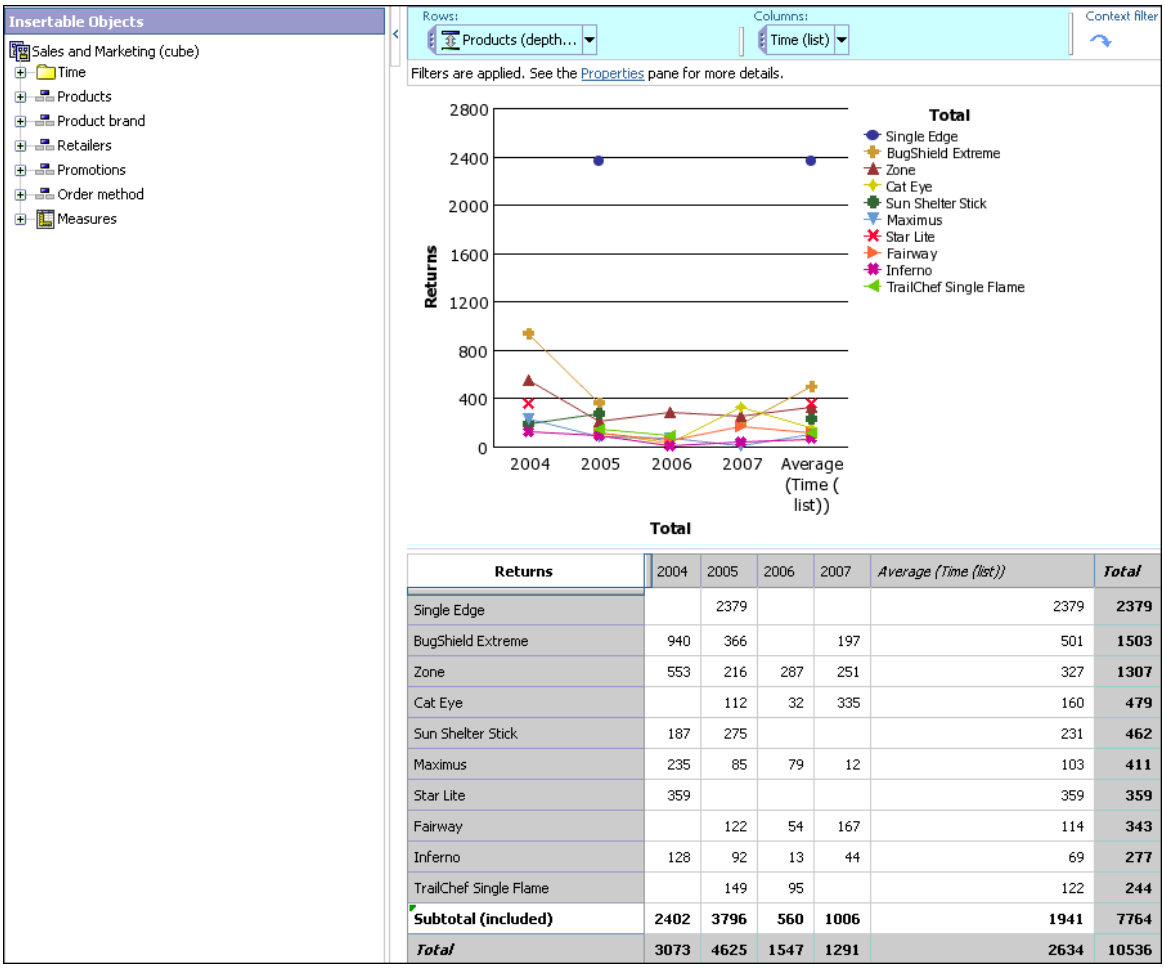
   - In the overview area, right-click **Time (list)**, select **Summarize**, and click **Average (Time (list))**.

     The **Average (Time (list))** summary is added to the crosstab. This summary shows the average number of returns over the fours years displayed in the crosstab.

8. View your analysis as a chart to see if there is a trend or spike in any of the top ten returns:

   - From the **View** menu, click **Select Chart Type**, select **Line Chart**, and click **Standard**.

     Take note of the top ten products with the highest returns. There may be some products, like Single Edge, that are anomalies. You may want to exclude them from your analysis or you may decide that you need to be comparing returns to other metrics; such as quantity sold or gross profit.



Returns	2004	2005	2006	2007	*Average (Time (list))*	*Total*
Single Edge		2379			2379	**2379**
BugShield Extreme	940	366		197	501	**1503**
Zone	553	216	287	251	327	**1307**
Cat Eye		112	32	335	160	**479**
Sun Shelter Stick	187	275			231	**462**
Maximus	235	85	79	12	103	**411**
Star Lite	359				359	**359**
Fairway		122	54	167	114	**343**
Inferno	128	92	13	44	69	**277**
TrailChef Single Flame		149	95		122	**244**
Subtotal (included)	**2402**	**3796**	**560**	**1006**	**1941**	**7764**
Total	**3073**	**4625**	**1547**	**1291**	**2634**	**10536**

9. Change the top ten definition to filter on year 2007 to give you the most recent data for product returns. Notice that the year 2007 is not a complete year of data.

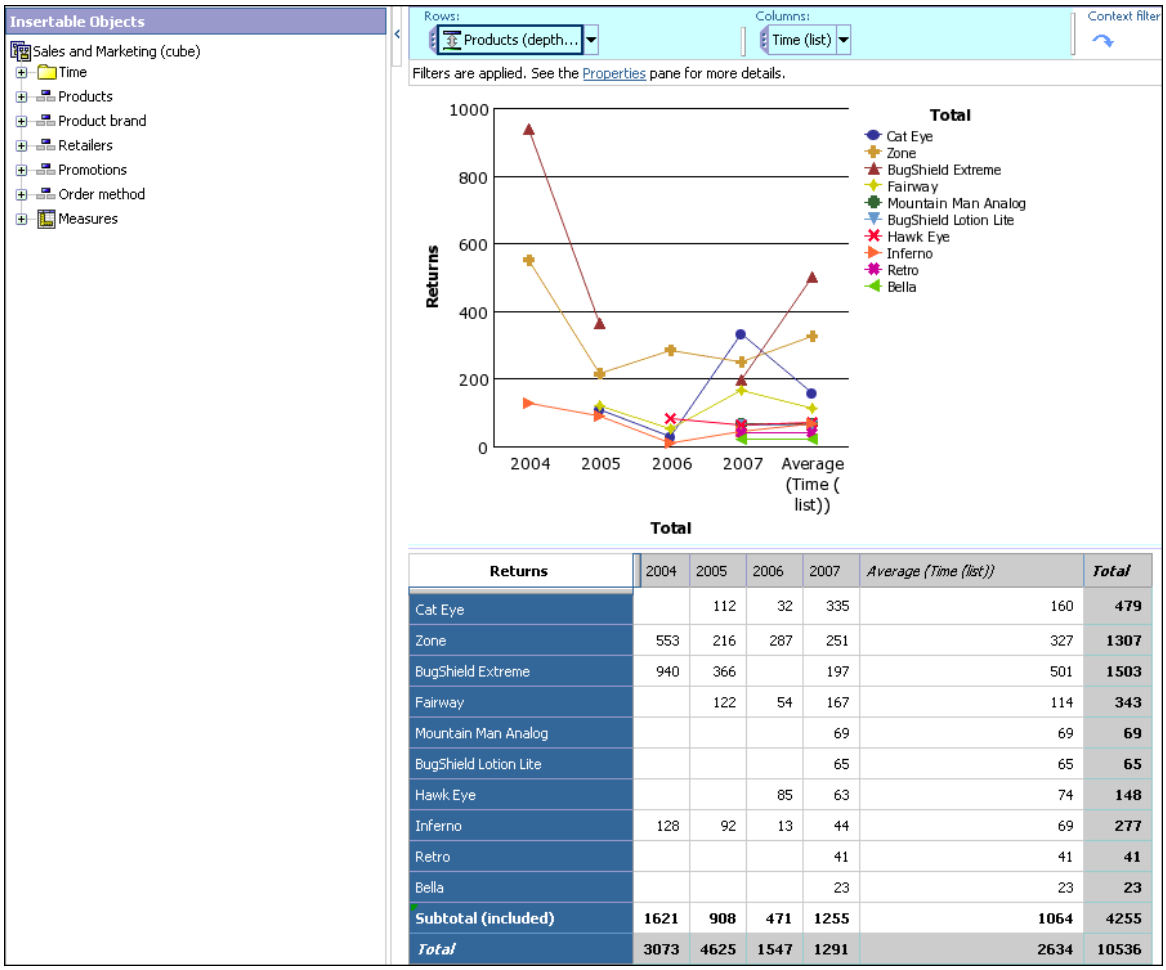
   - In the overview area, right-click **Products (depth 3)**, click **Top or Bottom**, select **Top**, and click **Custom**.
   - In the **Define top or bottom filter** pane, from the **For column** list, select **2007**.

     By specifying 2007 in the top definition, you change the filter context to be specifically on the highest top ten returns for the year 2007. In addition, you see the other years in the crosstab, to give you some additional historical information.

     Tip: In the definition, you can specify the number of items you want by number, percentage, or sum.
   - Click **OK**.

     Notice that Cat Eye has the highest number of returns. The list also includes Inferno and Zone.

     Tip: In the overview area, using the **Time (list)** column, you can also filter on 2007. The data returned from using this filter will be different than setting the 2007 context in the top definition. Only 2007 data will appear in the crosstab, instead of including the historical data. You can use this type of filter to help you analyze your data to find out more information.



Returns	2004	2005	2006	2007	*Average (Time (list))*	***Total***
Cat Eye		112	32	335	160	**479**
Zone	553	216	287	251	327	**1307**
BugShield Extreme	940	366		197	501	**1503**
Fairway		122	54	167	114	**343**
Mountain Man Analog				69	69	**69**
BugShield Lotion Lite				65	65	**65**
Hawk Eye			85	63	74	**148**
Inferno	128	92	13	44	69	**277**
Retro				41	41	**41**
Bella				23	23	**23**
Subtotal (included)	**1621**	**908**	**471**	**1255**	**1064**	**4255**
Total	**3073**	**4625**	**1547**	**1291**	**2634**	**10536**

10. Look at the top ten products with the highest gross profit to see whether they include any of the products with the highest returns, which might impact the company's bottom line.

    - You can change the **Context** filter section of the overview area. When you do this, the values shown for the selected set also change. If you want the applied settings to ignore context changes, you can pin the context of the selected set.

      At the very bottom of the work area is a properties pane. Click the up arrows to open the pane. Click **Definition**, **Hold Current Context**, and click **OK**.

      Notice that a pin icon appears in the overview area.

    - Drag the **Gross Profit** measure to the **Measure** zone in the crosstab.

      Your top ten definition is automatically updated. Analysis Studio uses dynamic context by default, so that any changes you make in the crosstab are reflected in your analysis.

    Notice that Cat Eye doesn't appear in the top ten products with the highest gross profit. However, the product Inferno is the product with the second highest gross profit. Returns of Inferno will really impact the bottom line, since it contributes so much more than the other products to gross profit.

11. Save the analysis as **Returns vs Gross Profit over Time**.

Try on Your Own

- For report formatting and layout control, edit the report in Report Studio. With Report Studio, you can extend the report definition to include other reporting elements, or enhance the report by defining bursting rules. To use Report Studio, you must have the appropriate licensing and security permissions.

  Tip: From the **File** menu, click **Open in Report Studio**. After you save an analysis in Report Studio, you can no longer edit it in Analysis Studio.

For More Information

For information about using Analysis Studio, see the Analysis Studio online help.

Example - Work with Cognos Content in Microsoft Excel

You use Cognos 8 Go! Office to access Cognos content in Microsoft Office Excel where you can work with and add value to existing Cognos reports, apply calculations, and use your existing Microsoft Excel macros. When you reconnect to the Cognos server, you can refresh the data to obtain the latest information. You can also import content into Microsoft Office PowerPoint and Microsoft Office Word.

Cognos security is maintained in your Microsoft Office environment. For example, if you share a Microsoft Excel workbook with coworkers, when they connect to the Cognos server to retrieve or refresh data, their security permissions are used to retrieve the appropriate data.

This exercise shows how to

- import Cognos content into a Microsoft Excel workbook
- refresh data
- publish a workbook to Cognos Connection

You want to import the information from the two Query Studio sample reports named **Return Quantity by Product Line** and **Return Quantity by Product Line Chart** into Microsoft Excel.

To perform this exercise, you must have the appropriate licensing and security permissions. Also, Cognos 8 Go! Office must be installed and the .NET framework must be installed and configured on your computer.

Things to Notice

You use Cognos 8 Go! Office to import Cognos report elements, such as headers, footers, images, lists, and charts, in your Microsoft Excel workbook. You can import elements from different reports into the same workbook.

When you save your workbook, you can save it with or without data.

You can publish workbooks to Cognos Connection so that other users can access them.

At any time, you can click the arrow next to the help button, and click **Go to the Welcome Page** to return to the **Cognos 8 Welcome** page.

Steps

1. Start Microsoft Excel.

   The Cognos 8 pane appears on the right side.

2. To begin using Cognos 8 Go! Office, on the toolbar, click the **Logon** button, select the server that you want to connect to, type your user ID and password, and click **OK**.

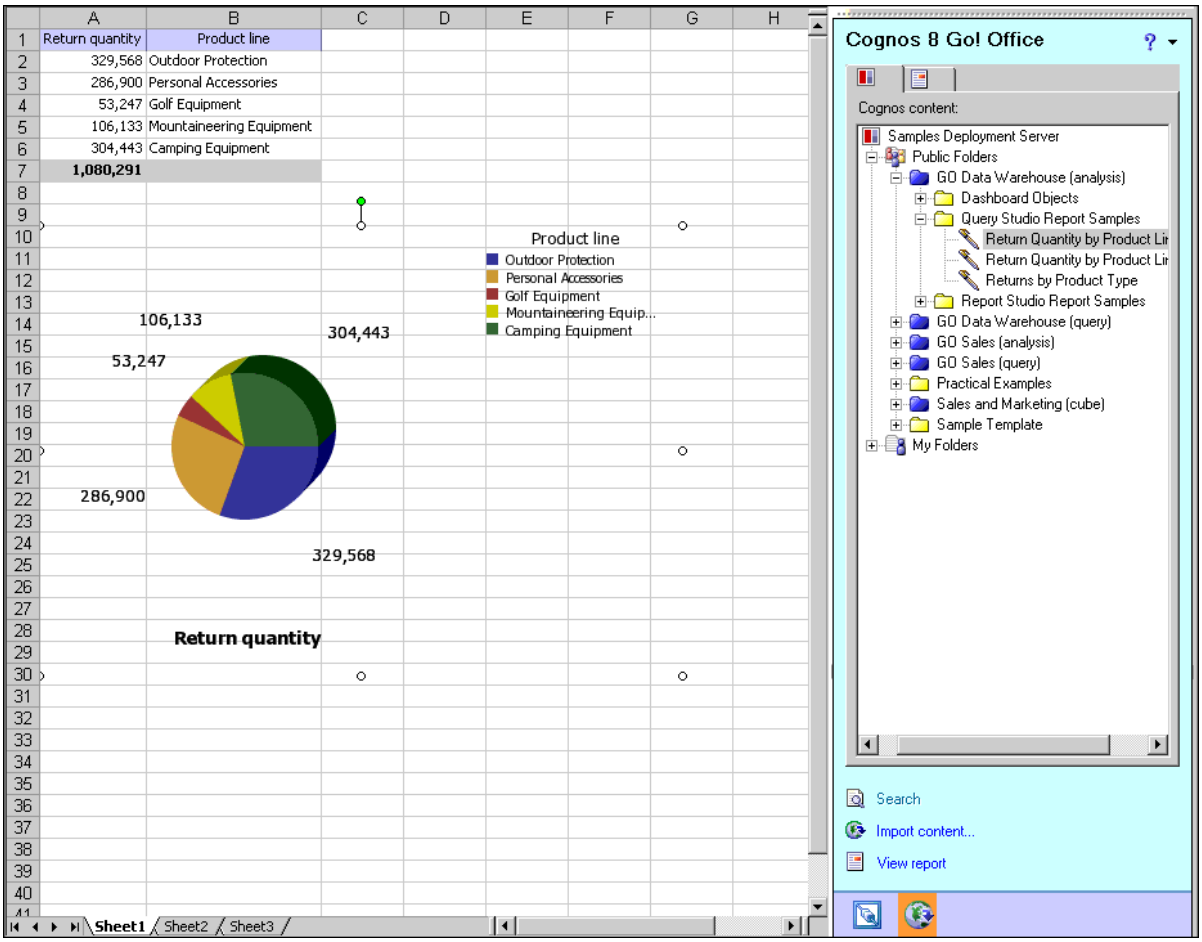
3. In the Cognos 8 pane, click **Cognos 8 Go! Office**.

4. Import the **Return Quantity by Product Line** and **Return Quantity by Product Line Chart** report elements in the workbook:

   - In the Cognos 8 pane, click the **Browse Content** tab.
   - Expand **Public Folders**, **GO Data Warehouse (analysis)**, **Query Studio Report Samples**, and click **Returns by Product Type**.
   - Click **Import content**.

     You can select the specific report elements that you want to import.

   - Click **Finish**.
   - Repeat the steps for the **Return Quantity by Product Line Chart** report.



The reports appear in the workbook.

5. Refresh the data in the report:

   - In the Cognos 8 pane, click the **Manage Data** tab.

     In the **Imported report elements** box, you can see all the elements in your workbook and their properties.

   - Right-click the report and click **Refresh Data and Formatting**.

     Because the sample database is static, the report contents do not actually change.

6. Publish the workbook to **My Folders** in Cognos Connection:

   - Save the workbook on your computer.

     Tip: To save the workbook without data, right-click the report and click **Remove Data**. You can later refresh all data.

   - From the Cognos 8 for Microsoft Office toolbar, click the publish button .

   - In the Publish dialog box, select the Cognos 8 server where you want to save the report, and click **Publish**.

   The workbook now appears in Cognos Connection. To open a workbook from Cognos Connection, select it and save it locally to your disk.

For More Information

For information about working with Cognos content in Microsoft Office, see the Cognos 8 Go! Office online help.

Example - Search for Business Intelligence Content

In Cognos Connection, you can perform full-text searches with Cognos 8 Go! Search to find entries that contain your key words. When you run a search, Cognos 8 Go! Search searches entries in the index for matching prompts, titles, headings, column names, row names, data items, and other key fields. Searches are not case sensitive and automatically include word variations. You can also limit your search to a specific type of entry, such as an agent.

The search results are ranked with the most relevant content at the top of the list. Cognos 8 security settings apply to search results so that only content that you have access to appears in the search results.

This exercise shows how to

- search all the business intelligence content stored in the content store for entries related to returns
- work with the search results

You want to search all the content to find other entries that relate to returns of Great Outdoors Company products.

To perform this exercise, you must have the appropriate licensing and security permissions. Also, Cognos 8 Go! Search must be installed.

Things to Notice

At any time, you can click the arrow next to the help button, and click **Go to the Welcome Page** to return to the **Cognos 8 Welcome** page.

Steps

1. Open Cognos Connection:
   - Start your Web browser.
   - In the address bar, type the URL supplied by your administrator, and then press Enter. The URL looks something like this:

     http://*servername*/cognos8
2. In the **Cognos 8 Welcome** page, click **Cognos content**.
3. In the Cognos Connection **Search** box, type **returns**.
4. Entries that match the search criteria, and which you have permissions to view, appear in the search results. To the left of the results appears a tree that allows you to refine your search.
5. Refine the search:

- In the tree, expand **Orders** and **Returned items**.
- Click **Return quantity**.

The search results now show only entries that contain the **Return quantity** measure.

Tip: To remove the search filter, under **Selected items**, delete the specific criteria you want, or click **Remove all**.

Try on Your Own

Perform a new search and limit your search results to only agent entries.

Tip: Click **New search**, click **Advanced**, and in the **Type** box, click **Agent**. Click **Search**.

For More Information

For information about searching for business intelligence content, see the Cognos 8 Go! Search Guide.

Glossary

agent

The object type created and edited by Event Studio. An agent contains the event condition and the associated tasks to perform. Once defined, an agent can be scheduled to check for instances of the event.

analysis

A process where a user interacts with data to gain insight and understanding. In Cognos 8, Analysis Studio is designed to facilitate analysis.

authentication

The process of verifying the identity of users when they log on. Users must be authenticated before they can be authorized to use any secured resources.

burst

To create many report results by running a single report once. For example, you can create a report that shows sales for each employee, and run it once, sending different results to regional managers by bursting on region. You set up bursting in Report Studio and enable it in the portal.

condition

An expression that yields a boolean value. Conditions are used in query expressions, query filters, and boolean report variables that can be used for conditional formatting, styles, data sources, layouts and blocks.

Content Manager

The Cognos 8 service that manages the storage of customer applications, including application-specific security, configuration data, models, metrics, reports, and report output. Content Manager is needed to publish models, retrieve or store report specifications, manage scheduling information, and manage the Cognos namespace.

content store

The database that contains data that Cognos 8 needs to operate, such as report specifications, published models, and the packages that contain them; connection information for data sources; information about the external namespace, and the Cognos namespace itself; and information about scheduling and bursting reports.

Design models and log files are not stored in the content store.

The Cognos 8 service that uses the content store is named Content Manager.

custom set

A custom set allows you to save the filter rules, calculations, and sort that defines a set created in Analysis Studio. Custom sets are listed in the Analysis Items tab and are saved as part of the analysis.

See also set, predefined set, and analysis.

data tree

Within a studio, contains objects such as query subjects, query items, dimensions, levels, and members. A data tree is used as a palette of the available data that can be inserted into calculations, filters, display areas, and other authoring gestures.

drill down

In Cognos Planning, drill down is a technique used to analyze D-Cube data that was imported by a D-Link. You can drill down on any single cell in a D-Cube. If the cell contains data transferred by a D-Link, drill down opens a view of the source data. If the data was imported from another D-Cube, drill down opens the appropriate selection from the source D-Cube. If the data was imported from an external source (a mapped ASCII file or an ODBC database), drill down extracts the relevant data from the source file and displays it in a special drill-down results dialog box.

In Cognos 8 BI, drill down refers to the act of navigating from one level of data to a more detailed level. The levels are set by the structure of the data. See also drill up.

drill up

The act of navigating from one level of data to a less detailed level. The levels are set by the structure of the data.

See also drill down.

event

An exceptional item of data, defined by specifying a query expression against items in a package. When data is detected matching the event condition, it causes an agent to perform tasks.

event key

A combination of data items that uniquely defines an event instance. Identifying an event instance enables the agent to determine if it is new, ongoing or stopped. The task execution rules then determine which tasks to execute for each instance.

information pane

In Analysis Studio, a pane that helps you to confirm your selection in the data tree by displaying related information such as the level and attributes.

layout

In reporting, layout defines the appearance of the report, including formatting, style, and design.

In report specifications, layout is the portion of the specification that defines how the data returned by queries is presented.

metric

A measure to assess performance in a key area of a business.

model

A physical or business representation of the structure of the data from one or more data sources. A model describes data objects, structure, and grouping, as well as relationships and security.

In Cognos 8 BI, a design model is created and maintained in Framework Manager. The design model or a subset of the design model must be published to the Cognos 8 server as a package for users to create and run reports.

In Cognos Planning, a model is a group of D-Cubes, D-Lists, D-Links, and other objects stored in a library. A model may reside in one or more libraries, with a maximum of two for Contributor.

namespace

For authentication and access control, a configured instance of an authentication provider. Allows access to user and group information.

In XML, a collection of names, identified by a URI reference, which are used in XML documents as element types and attribute names.

In Framework Manager, namespaces uniquely identify query items, query subjects, and so on. You import different databases into separate namespaces to avoid duplicate names.

package

A subset of a model, which can be the whole model, to be made available to the Cognos 8 server.

For Metric Studio users, see metric package.

portlet

A mechanism for displaying Web content as part of a portal page.

properties pane

Within a studio, the properties pane provides an overview of the properties for selected data. You can also use the properties pane to make several changes and apply them at the same time, instead of repeating several different commands.

publish

In Cognos 8 BI, refers to the creation of a package that makes metadata available to the Cognos 8 server. Information in the package is used to create reports and other content.

In Cognos Planning, refers to a function that is used to copy the data from Contributor or Analyst to a datastore, typically so it can be used for reporting purposes.

query

A specification for a set of data to retrieve from a data source. A report specification can contain one or more queries.

The type of object created and edited by Query Studio. A query is a subtype of report.

query item

A representation of a column of data in a data source. It contains a reference to a database column, a reference to another query item, or a calculation. Query items may appear in a model or in a report.

query subject

One of the types of objects inside a model. A query subject can be defined as a collection of references to items of other query subjects, or expressed as an SQL expression that represents selected query items. These query items will be retrieved from objects such as tables, synonyms, views, and so on. Query subjects contain query items.

report

A set of data deliberately laid out to communicate business information. Depending on the context, "report" may refer to report specification or report output.

Report (more precisely, report specification) is the generic term for the objects created or edited by Query Studio, Report Studio, and Analysis Studio.

report output

Report output combines data at the point in time when the report was run with a report specification. It is a document that can be displayed, printed, or emailed. Cognos 8 can produce report outputs in HTML, PDF, Excel, or CSV formats.

report specification

The definition of queries, prompts, layouts, and styles that make up a report. A report specification is combined with data by a run operation to create report outputs. You create report specifications by using Report Studio, Query Studio, Analysis Studio, or through the Software Development Kit.

report view

A reference to another report that has its own properties, such as prompt values, schedules, and results.

You use report views to share a report specification instead of making copies of it.

scorecard

A collection of metrics representing the performance of one unit or aspect of an organization.

scorecard structure

The hierarchy of scorecards that reflects how an enterprise organizes its metrics.

set

A collection of related items or members. Members in the set may be selected by one or more filter rules or by selecting specific members.

See also specific set definitions (detail-based set, selection-based set, and so on).

strategy

In performance management, a strategy is a set of objectives. It states what the organization wants to accomplish over the next three to five years.

strategy map

In Metric Studio, a strategy map is a visual representation of the strategy and the objectives of that strategy for an organization. For example, a strategy map may show employees how their jobs are aligned to the overall objectives of the organization.

summary

In reporting and analysis, summaries are aggregate values that are calculated for all the values of a particular level or dimension. Examples of summaries include total, minimum, maximum, average, and count.

task

An action performed by an agent if the event status meets the task execution rules. For example, an agent can send an email, publish a news item, or run a report.

template

A reusable report layout or style that can be used to set the presentation of a query or report.

watch list

A list of metrics that each user has chosen to monitor closely. If notification is enabled in Metric Studio, the user will receive email notification of changes to these metrics. Users can also choose to display their watch list as a portlet within Cognos Connection.

work area

The area within a studio that contains the report, analysis, query or agent currently being used.

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